

BIREME / PAHO / WHO

Latin American and Caribbean Center on Health Sciences Information

Documents conformation

Manual for creating user's documents

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Sao Paulo - 2005

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Manual for creating user's documents

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**"Few are the choices we are given, the
sands of time pass quickly by..."**

Richard Carpenter

Methodology document set

The complete set consists of **1** documents:

1. Manual for creating user's documents.

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ReferenceMediumType	66
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ReferenceOrgName1	66
ReferenceOrgName2	66
ReferenceOrgName3	67
ReferencePresentationDate	67
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Abbreviations used

- ABNT. Associação Brasileira de Normas Técnicas [Brazilian Association of Technical Standards].
- ANSI. American National Standards Institute.
- ASCII. American Standard Code for Information Interchange.
- BIREME. Latin American and Caribbean Center on Health Sciences Information.
- BVS. Biblioteca Virtual em Saúde (*see* VHL).
- CSS. Cascading Style Sheet.
- DTD. Document Type Definition.
- HTML. HyperText Markup Language.
- HTTP. HyperText Transfer Protocol.
- ISO. International Organization for Standardization.

- PAHO. Pan American Health Organization.
- PDF. Portable Document Format.
- SGML. Standard Generalized Markup Language.
- UMLS. Unified Medical Language System.
- UNESCO. United Nations Educational, Scientific and Cultural Organization.
- UNIFESP. Universidade Federal de São Paulo
- URL. Universal Resource Locator.
- VHL. Virtual Health Library.
- WHO. World Health Organization.
- XHTML. eXtensible HyperText Markup Language.
- XML. eXtensible Markup Language.
- XSL. eXtensible Stylesheet Language.
- XSLT. eXtensible Stylesheet Language Transformations.

How to use this manual

This manual is aimed to help in the process of standardizing the applications user's manuals from the Products Catalogue. For this purpose, it is used a series of templates built in MS-Word with sections, basic and standard texts, paragraph and character styles, foreseen the information groups and hierarchies for further conversion to the XML format.

Structure

This document is structures in 5 sections:

1. Installing the template in MS-Word;
2. Using the template to start a new document;
3. Migrating a document to the new template;
4. Special situations;
5. Template structure.

There are two additional chapters: one containing the bibliographic references and the other with a glossary of terms used in both the template and this document.

The more relevant terms can be also found in the analytical index at the end of the document.

Conventions used

It have been established the ISO standards as a model, and when missing it, the ABNT standards. Provided that both manuals and guides are non-conventional documents, is has been decided to be more relaxed on some topics defined by the standards, having a minimum of organization and common sense.

Using ISO 2145(14) as modelo, it has been established the following sections to a standar document:

1. Title page
2. Copyright notice, card catalog and data about the institution
3. Acknowledgements
4. Citation
5. Set of documents on the methodology
6. Table of contents
7. Table of figures
8. Abbreviations used
9. How to use this manual
10. Preface
11. Text in the manual
12. Bibliographical references
13. Glossary
14. Appendices
15. Analytical index

To normalize the Table of Contents it has been consulted the NBR 6027 (3) and for the Bibliographical References the ISO 690 (10) and ISO 690-2 (11). The title page follows the ISO 1086 (13) in general, and for the analytical index, it has been used the ISO 999 (12) guidelines. The citation model is one of those described by the ISO 690 (10).

In the section "About the Documents normalization" of the Preface it is described the preliminary study and standardization requirements survey.

In the following chapters there are described the structural elements, their compulsoriness, how to use the template, migration examples and how to start a document.

The more relevant terms are grouped in a glossary at the end of the document.

An analytical index completes the document, allowing the user to easily find related topics and subtopics.

This manual is also intended to improve the usage of MS Word by Bireme's workers, provided it teaches many advanced topics such as style cascade usage, table of contents generation, table of figures and tables, analytical index, document properties' fields and so on.

Commands, paths and terminologies that may vary according to text processor version (in this case, MS-Word) will be described in the same line separated by slash. Eg.: Term/Other term.

When having more than one possibility, each one will be separated by slash. Eg.: Term1/Term2/Term3/Term4 ...

The ABNT standards NBR 6023 (1), NBR 6024 (2), NBR 6027 (3), NBR 6029 (4), NBR 6034 (5), NBR 10520 (6) and NBR 10524 (7) were used as initial reference due to the fact they are based on ISO.

The final DTD of the documents is based on ISO Book 12083 (15) with post-adjustments made in order to accommodate the resources required by the template.

In terms of organization, the document template follows the basis of the cited standards as well as suggestions from "Elaboração e divulgação do trabalho científico" (16) and "Manual de normalização de trabalhos técnicos, científicos e culturais" (17).

The bibliographical references also used the document "Diretrizes para apresentação de dissertações e teses da USP" (18), specially to compose the models presented.

The visual layout was first defined according to the book "The Non-Designer's Design Book" (19) and later revised and improved by Luiz Caraméz (GA/DGI).

The typology used is part of the basic font pack of a standard Windows installation in order to avoid visual and printable problems when changing to a different workstation.

Preface

About BIREME

Year after year, BIREME has been following its mission of being a center dedicated to scientific and technical health information for the region of Latin America and the Caribbean. Founded in Brazil in 1967, under the name of Regional Medicine Library (which the acronym BIREME comes from), it has always met the growing demand for up-to-date scientific literature from the Brazilian health systems and the communities of healthcare researchers, professionals and students. Then, in 1982, its name changed to Latin-American and Caribbean Center on Health Sciences Information so as to better express its dedication to the strengthening and expansion of the flow of scientific and technical health information across the region, but kept the acronym.

Networking, based on decentralization, on the development of local capacities, on sharing information resources, on developing cooperative products and services, on designing common methodologies, has always been the foundation of BIREME's technical cooperation work. It has been like this that the center established itself as an international model that fosters professional education with managerial and technical information with the adoption of information and communication paradigms that best meet local needs.

The main foundations that gave origin and which support the existence of BIREME are following:

- ✓ access to scientific and technical health information is essential for the development of health;
- ✓ the need to develop the capacity of Latin American and Caribbean countries to operate their sources of scientific-technical health information in a cooperative and efficient manner;
- ✓ the need to foster the use and to respond to the demands for scientific-technical health information from governments, health systems, educational and research institutions.

BIREME, as a specialized center of the Pan-American Health Organization (PAHO)/ World Health Organization (WHO), coordinates and conducts technical cooperation activities on the management of scientific information and knowledge with the aim of strengthening and expanding the flow of scientific health information in Brazil and in other Latin American and Caribbean countries as a key condition for the development of health, including its planning, management, promotion, research, education, and care.

The agreement that supports BIREME is renewed every five years by the members of the National Advisory Committee of the institution (PAHO, Brazilian Ministry of Health, Brazilian Ministry of Education and Culture, Secretary of Health of the State of São Paulo, and Federal University of São Paulo – Unifesp). The latter provides the physical infrastructure necessary for the establishment of the institution.

In 2004 the institution took on the responsibility of becoming a knowledge-based institution.

The Virtual Health Library (VHL)

With the rise and consolidation of the internet as the prevailing means of access to information and communication, BIREME's technical cooperation model evolved,

as of 1998, to build and develop the Virtual Health Library (VHL) as a common space for the convergence of the cooperative work of producers, intermediaries, and users of information. The VHL promotes the development of a network of sources of scientific and technical information with universal access on the internet. For the first time there has been a real possibility of equal access to health information.

To BIREME, the Virtual Health Library is a model for the management of information and knowledge, which includes the cooperation and convergence between institutions, systems, networks, and initiatives of producers, intermediaries, and users in the operation of networks of local, national, regional and international information sources favoring open and universal access.

Today, every country in Latin America and the Caribbean (Region) participates either directly or indirectly in the cooperative products and services offered by the VHL, which includes over 1,000 institutions in more than 30 countries.

The VHL is simulated in a virtual space of the internet formed by a collection or network of health information sources in the Region. Users of different levels and locations can interact and navigate in the space of one or many information sources, regardless of where they are. Information sources are generated, updated, stored and operated on the internet by producers, integrators, and intermediaries, in a decentralized manner, following common methodologies for their integration in the VHL.

The VHL organizes information in a structure that integrates and interconnects reference databases, specialist directories, events and institutions, a catalogue of the information resources available on the internet, collections of full texts with a highlight for the SciELO (*Scientific Electronic Library Online*) collection of scientific journals, selective information dissemination services, information sources to support education and decision-making, news, discussion lists, and support to virtual communities. The space of the VHL is, therefore, a dynamic and decentralized network of information sources based on which it is possible to retrieve and extract information and knowledge to support health decision-making processes.

The Virtual Health Library can be visualized as a distributed base of scientific and technical health knowledge that is saved, organized and stored in electronic format in the countries of the Region, universally accessible on the internet and compatible with international databases.

About the Documents conformation

Because of the BVS Technical Support restructuring, it was evident the need to survey on the situation of the user's documents of Products Catalogue's programs.

Then there were created two forms: one to collect quantitative data related to the available documents (Appendix 1) and the other to collect qualitative and structural data (Appendix 2).

The survey pointed to irregular and missing topics:

1. lack of availability of document simultaneously in three languages (portuguese, spanish, english);
2. missing of a structural and visual model to the documents - missing identity;
3. missing of a logical pattern to meet the requirements of Kipling methodology (5W1H - *What, Why, When, Where, Who and How*).

Based in preliminary data, it begun the recollection of documents to assist the definition of a template that:

1. was easy to use, even in case of migration;
2. could - simultaneously - standardize, organize and publish the documents with unique visual and structural identity;
3. allowed future reuse of information (conversion to XML, for example);
4. followed the rules established by standards and procedures defined by specialized institutions.

Once that Bireme already had their desktop PCs installed with Microsoft Word, it was adopted as the base text processor to develop the template, avoiding additional costs with software and training.

The built template contains sections and texts pre-defined in order to help user in understanding the model.

It is intended, by using an XSL file yet to be created, to transform the contents of the documents previously marked up, to XML structures files, being this process beyond the scope of this manual.

Installing the template in MS- Word

For MS-Office 2003 and XP

1. Start an Internet Explorer session;
2. Enter the URL below the address line in the browser;
<http://bvsmodelo.bvsalud.org/download/nordoc/bvs-template.dot>
<http://bvsmodelo.bvsalud.org/download/nordoc/bvs-template-numbered.dot>
3. Select the directory C:\Documents and Settings:
4. Choose a user name;
5. Select Application Data\Microsoft\Templates {Dados de Aplicativos\Microsoft\Templates};
6. Click on the **Save** button.

For other MS-Office versions

Contact Bireme's Technical Support Staff and ask for an update of your Microsoft Office package.

Installing the template with macros for cleaning up

For MS-Office 2003 and XP

1. Start an *Internet Explorer* session;
2. Enter the *URL* below the address line in the browser;
`http://bvsmodelo.bvsalud.org/download/nordoc/macros-bvs.dot`
3. Select the directory `C:\Documents and Settings:`
4. Choose your user name;
5. Choose `Application Data\Microsoft\Templates {Dados de Aplicativos\Microsoft\Templates}`;
6. Click on the **Save** button.

For other MS-Office versions

Contact Bireme's Technical Staff to order an update for your Microsoft Office package.

Using the template to start a new document

In this chapter we present a detailed description of the steps to generate a document having the VHL programs' document template as a basis.

Creating a new document

1. Start the MS-Word;
2. Choose **File**, **New** in the main menu;
3. In **Templates Templates** select the option **On my computer...** ;
4. Select the **bvs-template.dot** template and click on **OK**
5. Save the document.

The document created must be similar to the template shown below. Notice the text in light grey. These are document fields and their functions will be presented in the next session.

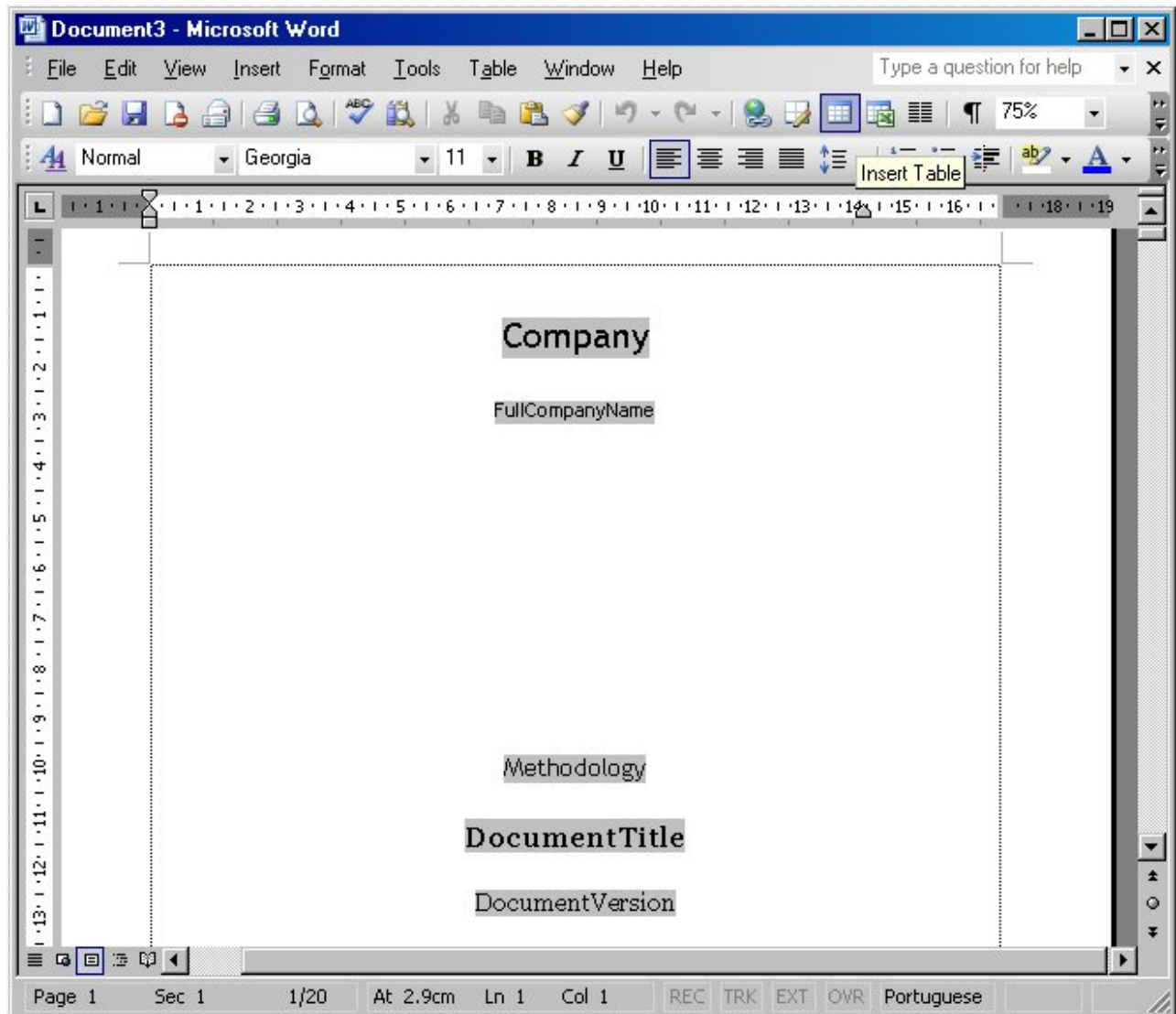


Fig. 1 – New Document based on the template.

Customizing the new document

As we have already seen in chapter 1, the document template has fields with information that will be used in the context of the document itself.

In order to change these fields, assuming the MS-Word is open, proceed as follows:

1. Choose **File**, **Properties** in the main menu;
2. In the properties window, change the content of the **Company** field to the name of the institution you choose;

3. Change the contents in the Author field to the name of the document's authors (if applicable).

Document3 Properties

General Summary Statistics Contents Custom

Title: BVS-Template

Subject:

Author: bireme

Manager:

Company: Company

Category: template

Keywords: template, bvs

Comments:

Hyperlink base:

Template: bvs-template1.dot

☐ Save preview picture

OK Cancel

Fig. 2 – Document's properties window. Summary Table.



The Company field comes pre-configured with the value "BIREME / PAHO / WHO". The Author field comes pre-configured with the value "BIREME". The Title field may be filled out with the name of the file in the operating system; the other fields of this table are not mandatory, but filling them out enables locating them later, by keywords or by subject.

4. Select the Custom table;
5. In the Custom table, choose the field Methodology at the bottom of the window, as shown in figure 3;
6. Fill out the Value field with the methodology title;

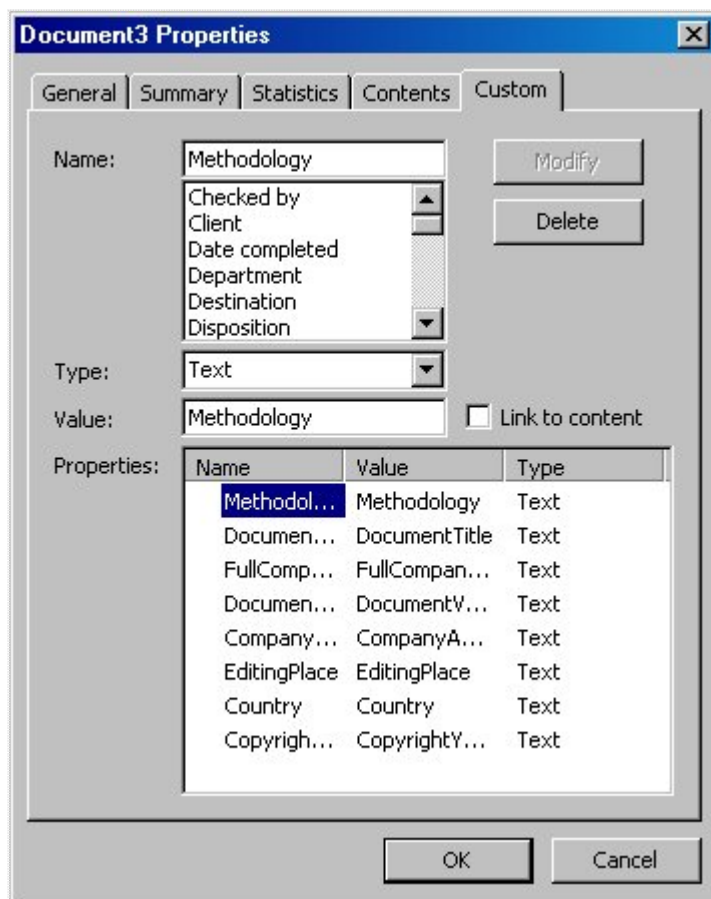


Fig. 3 – Document's properties window. Custom Table

7. Click on the **Modify** button to record the change;



If the manual is not within the scope of a specific methodology enter a blank space.

8. Repeat steps 5 to 7 for each one of the fields (**DocumentTitle**, **FullCompanyName**, **DocumentVersion**, **CompanyAddress**, **EditingPlace**, **Country** and **CopyrightYear**);
9. Click on the **OK** button when you are finished.



All fields must be filled out. Whenever a field has no content, enter a blank space. The fields must not, under any circumstances, be deleted or have their names changed, since their values have been defined in the template to be used throughout the document.

The FullCompanyName field comes pre-configured with "*Centro Latino-Americano e do Caribe de Informação em Ciências da Saúde*".

Updating field preview in the document fields

1. Select **Edit**, **Select All**;
2. Press **F9**;



During the updating process, not only will the fields be updated, but also the table of contents and the list of figures, thus MS-Word will prompt you to indicate how these tables are to be updated. Always chose the option update entire table.



Fig. 4 – Window to confirm the updating of the table of contents.

3. Select **File**, **Print Preview** to update the title of the document in the header, since pressing the key **F9** will only update the data in the body of the document, not the headers and footers;
4. Click on the **Close** button to exit the preview mode.

Updating data in the card catalog

On the second page of the template we have the Card catalog. Note that there are several texts with grey as the background. These are fields, the contents of which come from the document properties area.

Ficha Catalográfica
<p>BIREME (Country)</p> <p>DocumentTitle. / BIREME (org.). EditingPlace : Company, CopyrightYear.</p> <p>3 p.</p> <p>1. Manual do usuário. 2. Acesso à informação. 3. Sistemas de informação. 4. Gerenciamento de informação. 5. Saúde Pública. 6. Serviços de saúde.</p> <p>I. BIREME II. Título</p>

Fig. 5 – Details of the Card catalog

Make the changes you deem necessary to update the Card Catalog with data about authors, etc.

Updating the Acknowledgements page

This page is optional; however, should you wish to use it, replace the word “text” with the acknowledgement text or with the list of people who collaborated to the edition and/or publication of your document.

If you don't want to use this page, it may be excluded from the document prior to its finalization. These steps will be explained in a separate chapter.

Updating the citation page

This page is optional; however, should you wish to use it, replace “citation text” with the citation and “author” with the author of the citation.

If you don't want to use this page, it may be excluded from the document prior to its finalization. These steps will be explained in a separate chapter.

Updating the section Set of documents on the methodology

This page is mandatory if document is part of a methodology and the number of methodology documents is equal to or larger than two.

For each document title that is part of the methodology:

1. Enter the document title, finalizing with semi-colon, except for the last item on the list;
2. Select the style **NumberedItem**



If you wish, the current document may be indicated in bold.

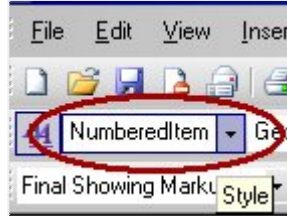


Fig. 6 – Detail of the style box in MS-Word (NumberedItem).

Updating the page with Abbreviations used

An abbreviation must have:

1. An acronym followed by a full stop;
2. Name in full;
3. Translated name (if necessary) between brackets.

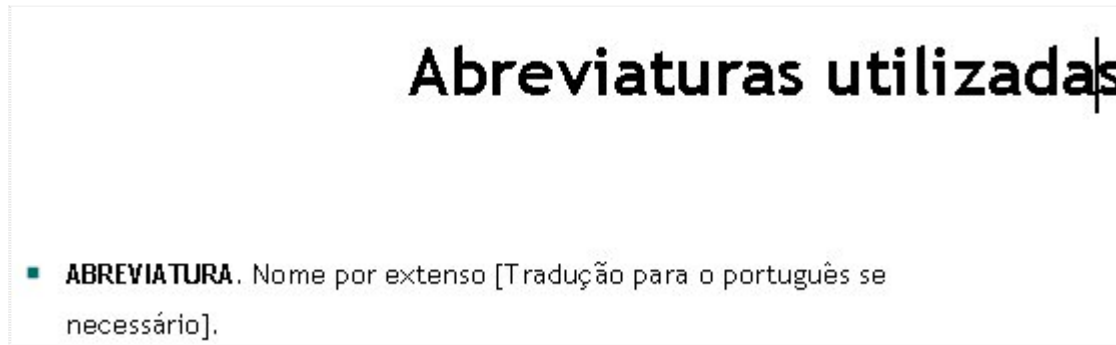


Fig. 7 – Detail in the Abbreviations section.

For each abbreviation entered in the format shown in figure 7:

4. Apply the paragraph style **Entry**;



Fig. 8 – Detail of the style Box in MS-Word (Entry).

5. Select the acronym;
6. Apply the character style **EntryHead**;



Fig. 9 – Detail of the style Box in MS-Word (EntryHead).

7. Select the name in full and the translated name (if any);
8. Apply the character style **EntryDescription**.



Fig. 10 – Detail of the style Box in MS-Word (EntryDescription).

This section is mandatory.

Creating the section How to use this manual

In this session, provide details about the manual's content structure and the conventions used in the publication. Refer to technical rules and methods and describe any exceptions. Enter examples and templates if needed. Images may also be used, as long as the instructions for formatting and identifying them are followed.

This section is mandatory.

Updating the section *About the Methodology* in the Preface

Write a brief history of the methodology, explaining what it is, why it was created, who it was designed for, how to use it, etc.

If there is no text relative to the methodology, leave only the two topics (*About Bireme* and *About the VHL*).

Creating the text for the manual or guide

This is where the actual content of the manual or handbook starts. We suggest that this content be planned in terms of its structure, grouping the information according to topics or subjects.

About the styles

The template has several pre-defined styles to help you in format the text. There are two different ways to apply styles, as shown:

1. Using the style Box in the task panel

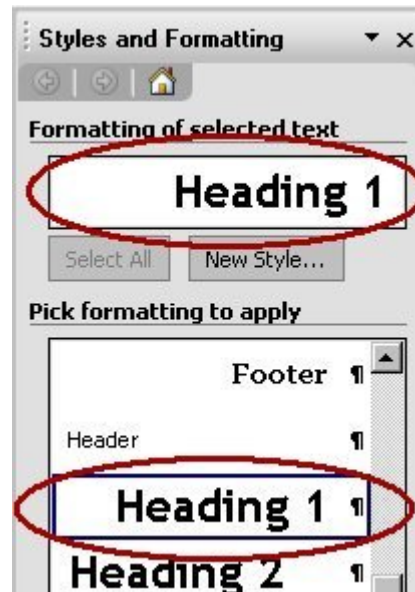


Fig. 11 – Detail of the style Box in the task panel.

2. Using the style box in the formatting toolbar

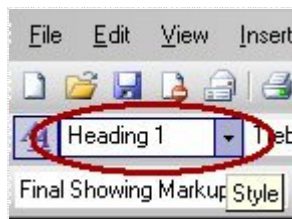


Fig. 12 – Detail of the style box in MS-Word (Heading 1).

The styles we will use can be divided into:

1. Styles for chapter titles, subtitles, sections and subsections

Heading 1

Heading 2

Heading 3

Heading 4

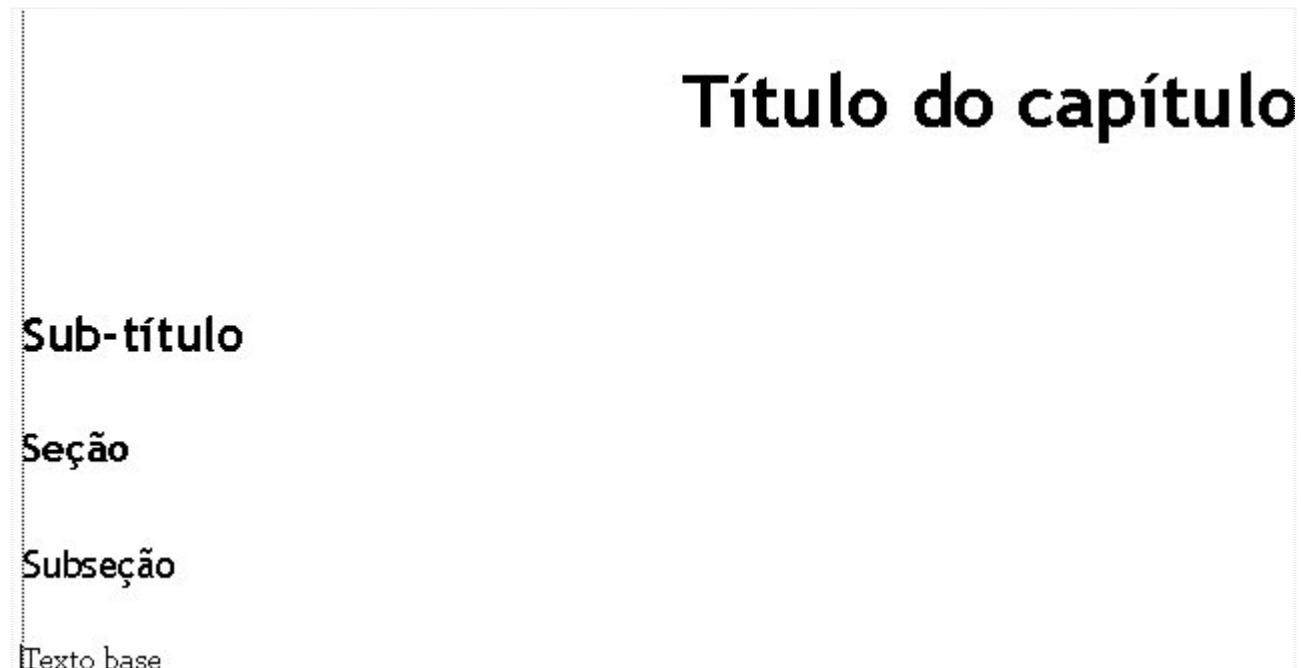


Fig. 13 – Detail of an example of chapter with hierarchy

2. Text styles

Normal (estilo padrão)

Item

Subitem

NumberedItem

Body_1

Body_1_Bullet

Body_1_Letter

Body_1_Number

Body_2

Body_2_Bullet

Body_2_Letter

Body_2_Number

Body_3

Body_3_Bullet

Body_3_Letter

Body_3_Number

Body_4

Body_4_Bullet

Body_4_Letter

Body_4_Number

3. Styles for figures and images

Figure

FigureLabel

FigureRef

FigureID

4. Styles for tables

TableObject

5. Style for notes, observations, etc.

Notes



The **Notes** style may be followed by special formatting and its use is explained in the *Special situations* chapter.

As shown in figure 13, each chapter starts with *Heading 1* as the chapter's title.

Subdivisions are *Heading 2* for subtitles, *Heading 3* for the section and *Heading 4* for the subsection.

The base text will always be in *Normal* style, i.e. the standard style.

Hierarchically speaking, below the *Normal* style we have: *Item* and *NumberedItem* at the same level (sixth) and *Subitem* one level below (seventh).

There are also the "Body_n_Style" styles, starting at the *Item* level (*Body_1_Style*) and continuing up to the ninth level (*Body_4_Style*). In order to have a clearer picture of these concepts, see the table

On the example page there are three visible elements:

1. the "Chapter heading" in **Heading 1 Heading 1** style;
2. the term "Text" in **Normal** style; and
3. one code "{new_section}".

In the first case, it is only necessary to replace the text, i.e. to overwrite the title of the first chapter.

In the second case, the term “Text” defines literally where the manual or handbook text starts.

As to the code "{new_section}" it must not be replaced and should always be at the end of the text being entered. This rule must be followed until the function of the code is explained in the topic *Creating a new chapter*.

Clear formatting

Texts entered by other people may come with “in-line” formatting, which may be a nuisance when applying styles.

There are two techniques to solve this problem:

- a. Using the **Clear Formatting Clear Formatting** option in the MS-Word style box;
- or
- b. Changing styles globally:
 1. Select the arrow in the style of the current paragraph in the style box;
 2. Select the option **Select All *n* Instance(s)**;
 3. After selecting the text, apply the desired style.

Applying styles on titles, subtitles, sections and subsections

1. Place the cursor at any point of the paragraph;
2. Apply the style desired (**Heading 1**, **Heading 2**, **Heading 3** or **Heading 4**).



In case of a pre-defined "in-line" format in the paragraph, use the option **Clear Formatting** in the style box to eliminate the formats and leave the text in the default font prior to applying any style.

Applying styles for images and graphs

There are 4 styles defined for images and graphs: two of them are meant for paragraphs and two for characters.

In order to correctly apply these styles it is assumed that the image or the graph is alone in a paragraph and that it has a written legend in the next paragraph.

It is also assumed that the image has been included with the option **Insert**, **Picture**, **From File**, **Link to File**.

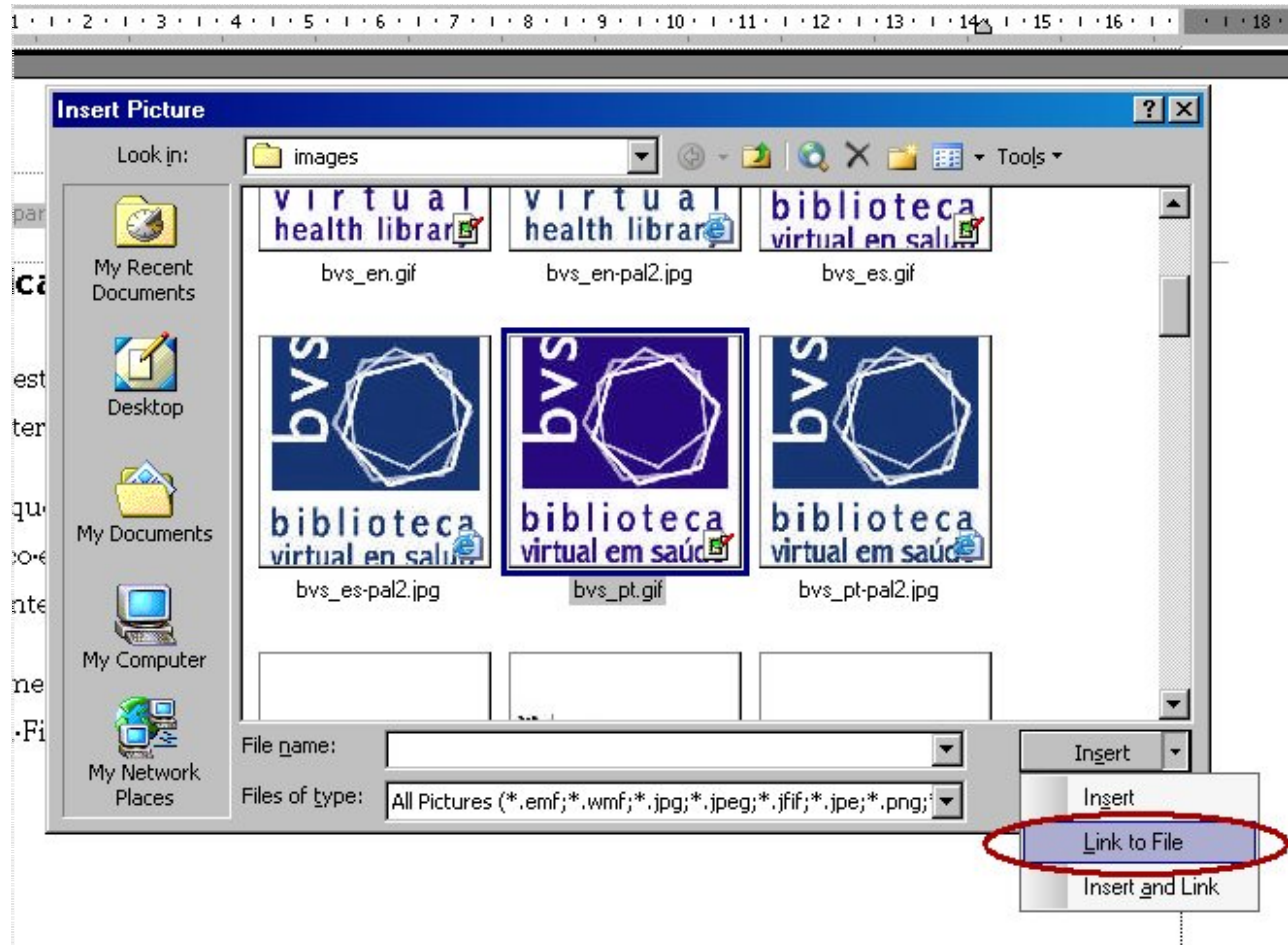


Fig. 14a – Detail of the operation to include an image link.



Fig. 14b – Image and legend examples.

1. Place the cursor over the paragraph where the image is inserted;
2. Apply the style **Figure**;
3. Select the image;
4. Apply the style **FigureRef**;
5. Place the cursor at any point in the paragraph where the legend is located;
6. Apply the style **FigureLabel**;
7. Select at the beginning of the paragraph the term "Fig." and the figure number;
8. Apply the style **FigureID**.



In case of a pre-defined "in-line" format in the paragraph, or if there is an error in the sequence above use the option **Clear Formatting** in the style box to eliminate the formats and leave the text in the default font prior to applying any style.

If the style of images and graphs is used, the section "Table of Figures" can be automatically generated by the MS-Word. This operation will be detailed in the topic *Generating the Table of Figures*.

Applying the style for tables

1. Place the cursor on any of the table cells;
2. Select the whole table using the command **Table**, **Select**, **Table**;
3. Apply the style **TableObject**.



This style serves only to identify that the content is a table. In the first version of the template we will not treat the table lines as it would be impracticable to foresee all possibilities in terms of contents

Applying styles for programs' source code

If the selection is made by paragraphs

1. Place the cursor on the paragraph or select the paragraphs you want to format;
2. Apply the style **Plain Text**.

If the selection is made by characters

1. Select the text to be formatted;

2. Apply the style FixedFont.

Creating a new chapter

In order for the template to keep the original layout characteristics as defined, it is necessary to stick to the form that the MS-Word organizes the elements on the page.

Each division explained in the chapter *General Features of the Template* is separated by the *Section break* feature, enabling headers and footers to be defined with characteristics of their own.

In MS-Word, when a new section is created it takes the characteristics from the previous section until different properties are defined or until the link that unites them is broken.

Note that starting at the section *Preface* , all other sections have footers in Arabic numerals.

In order to keep all these characteristics for the following chapters we will insert a section break. We can do this in two different ways. The first one does not change the document's preview and the second one shows all the MS-Word control characters.

Note that the second procedure is considered to be the best one, and the most professional, even though some users may find it cumbersome to look at lots of symbols and marks. However, when apparent, these symbols enable users to have total control over the document's format.

Understanding the control characters

Compare the two images that follow:

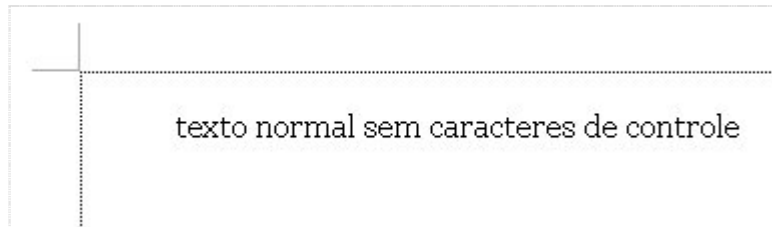


Fig. 15a – Example of text without control characters.

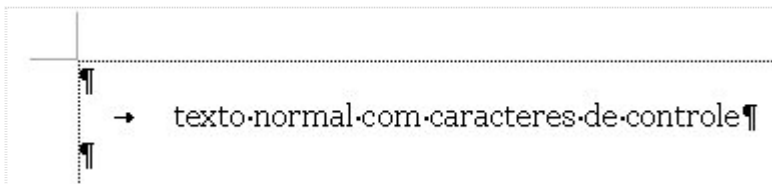


Fig. 15b – Example of text with control characters.

The character that looks like an inverted P (¶) defines the end of a paragraph. It is actually more than a physical separation between the end of a paragraph and the beginning of the next one. It stores all the information about the style that was applied, special formats, “in-line” formatting, etc.

The character arrow (→) defines a tabulation unit. Points between words define blank spaces.

See here how a section break is shown in MS-Word:

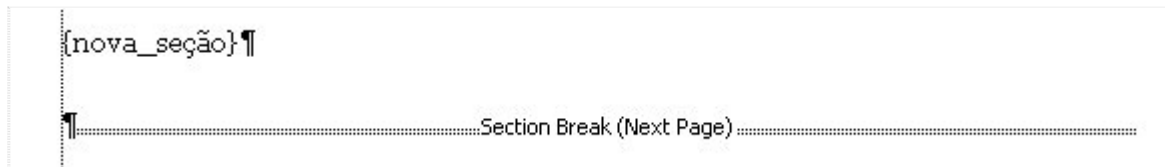


Fig. 16 – Section break according to the template.

Note that it is a double dotted line with the information on the type of break (*Section*) and the effect it has on pagination (*Next Page*).

Using the code "{nova_seção}" at the end of the text

1. Place the cursor before the term "{nova_seção}";
2. Press **Enter**;
3. Select **Insert**, **Break**;

4. In the dialog box, select in **Section break types** the option **Next page Next page**.

Using MS-Word's hidden characters

1. You can view the characters by clicking on the button **Show/Hide**;

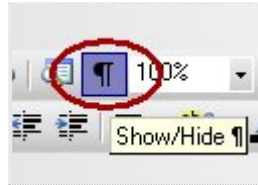


Fig. 17 – Detail of the button Show/Hide.

2. Delete the term " {nova_seção} " keeping the end of paragraph character ;

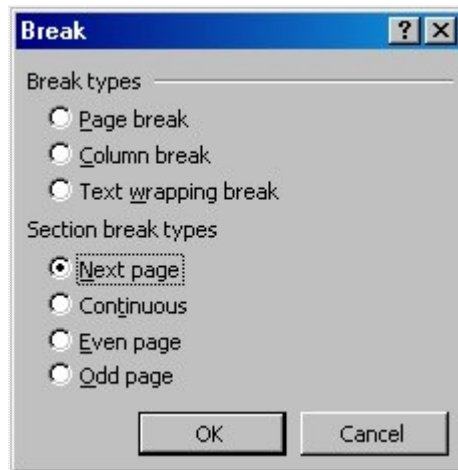


Fig. 18 – Detail of the operation to Insert section break.

3. Select **Insert**, **Break**;
4. In the dialog box, select in **Section break types** the option **Next page**.
5. Deactivate the characters view by clicking again on the button **Show/Hide**;

Creating Bibliographical References

Types of references

The template provides for the use of several types of references as follows:

1. Monograph

{SURNAME of the AUTHOR(S), First name(S) (initials or in full)} {Author(s) Organization in full} {,} {e} {et al}. { *Title of the work* } : {subtitle} {[Electronic medium]}. {Translation}. {Edition}. {Place of publication (City)}: {Publisher}, {year of publication} {[cited DATE]}. {Pagination}. {ISBN}. {Available from Internet: <URL>}.

WILLIAMS, Robin. *Design for non-designers*: basic notions for visual planning. Transl. de Laura Karin Gillon. 3. ed. São Paulo : Callis, 1995. 144 p. ISBN 85-85642-40-8.

Public domain. *Webster's Dictionary* [online]. [cited 20 March 2005]. Available from Internet: <<http://www.bibliomania.com/2/3/257>>.

Paragraph style: ReferenceMonograph

Character style: ReferenceAuthors, ReferenceAuthorSurname, ReferenceAuthorForename, ReferenceOrgName1, ReferenceOrgName2, ReferenceOrgName3, ReferenceTitle, ReferenceSubtitle, ReferenceMediumType, ReferenceTranslation. ReferenceEdition, ReferenceLocation, ReferencePublisher, ReferencePublicationYear, ReferenceCitationDate, ReferencePublicationPages, ReferenceISBN, ReferenceURL

2. Monographic part

{SURNAME of the AUTHOR(S) of the referenced part, First name(S) (initials or in full)} {Author(s)' Organization in full} {,} {e} {et al}. {Title of the work in reference} {[Electronic medium]}. In: {SURNAME of the AUTHOR(S) of the publication, First name(S) (initials or in full)} {Author(s) Organization in full} {,} {e} {et al}. {Title of the publication} : {subtitle}. {Translation}. {Edition}. {Place of publication (City)}: {Publisher}, {year of publication} {[cited DATE]}. {Pagination}. {ISBN}. {Available from Internet: <URL>}.

Universidade de São Paulo. Sistema Integrado de Bibliotecas. Grupo DiTeses. Modelos de referências para dissertações e teses. In: Universidade de São Paulo. Sistema Integrado de Bibliotecas. Grupo DiTeses. Diretrizes para apresentação de dissertações e teses da USP : Document eletrônico e impresso. São Paulo : SIBi-USP, 2004. 110p. ISBN 85-7314-023-2.

Paragraph style: ReferenceMonographPart

Character style: ReferenceAuthorsPart, ReferenceAuthorSurname, ReferenceAuthorForename, ReferenceOrgName1,

ReferenceOrgName2, ReferenceOrgName3,
 ReferenceTitlePart, ReferenceMediumType,
 ReferenceAuthors, ReferenceAuthorSurname,
 ReferenceAuthorForename, ReferenceOrgName1,
 ReferenceOrgName2, ReferenceOrgName3,
 ReferenceTitle, ReferenceSubtitle, ReferenceTranslation,
 ReferenceEdition, ReferenceLocation, ReferencePublisher,
 ReferencePublicationYear, ReferenceCitationDate,
 ReferencePublicationPages, ReferenceISBN,
 ReferenceURL

3. Series publication

{Title of the publication} {[Electronic medium]}, {publication start and closing
 year} {[cited DATE]}. {Available from Internet: <URL>}. {Place} : {Publisher}.
 {ISSN}.

Dados - revista de ciências sociais, 1966 --. Rio de Janeiro : Instituto
 Universitário de Pesquisa. ISSN 0011-5258.

Dados - revista de ciências sociais [online], 1966 -- [cited 20 March 2005].
 Available from Internet:
 <http://www.scielo.br/scielo.php/script_sci_serial/pid_0011-5258/lng_en/nrm_iso>. ISSN 0011-5258.

Paragraph style: ReferenceSerial

Character style: ReferenceSerialTitle, ReferenceMediumType,
 ReferencePublicationYear, ReferenceCitationDate,
 ReferenceURL, ReferenceLocation, ReferencePublisher,
 ReferenceISSN

4. Journal article

{SURNAME of the AUTHOR(S), First name(S) (initials or in full)}
 {AUTHOR(S) ORGANIZATION IN FULL} {,} {e} {et al}. {Article title} :
 {subtitle}. {*Title of the publication* (abbreviated or in full)} {[Electronic
 medium]}, {month (in full)} {year of publication}, {volume}, {issue} {[cited
 DATE]}, {article's initial and final pagination}. {Notes}. {Available from
 Internet: <URL>}. {ISSN}.

MOURA, Ana Maria de Carvalho, PEREIRA, Genelice da Costa and CAMPOS,
 Maria Luiza Machado. A metadata approach to manage and organize electronic
 documents and collections on the web. *J. Braz. Comp. Soc.*, July 2002, vol.8,
 no.1, p.16-31. ISSN 0104-6500.

MUGNAINI, Rogério, JANNUZZI, Paulo and QUONIAM, Luc. Bibliometric indicators of the Brazilian scientific production: an analysis from Pascal base. *Ci. Inf.* [online]. May/Aug. 2004, vol.33, no.2 [cited 05 April 2005], p.123-131. Available from World Wide Web:
 <http://www.scielo.br/scielo.php?script=sci_arttext&pid=S0100-19652004000200013&lng=en&nrm=iso>. ISSN 0100-1965

Paragraph style: ReferenceSerialArticle

Character style: ReferenceAuthors, ReferenceAuthorSurname, ReferenceAuthorForename, ReferenceOrgName1, ReferenceOrgName2, ReferenceOrgName3, ReferenceArticleTitle, ReferenceSubtitle, ReferenceSerialTitle, ReferenceMediumType, ReferencePublicationMonth, ReferencePublicationYear, ReferenceVolume, ReferenceIssue, ReferenceCitationDate, ReferencePublicationPages, ReferenceNotes, ReferenceURL, ReferenceISSN

5. Thesis

{SURNAME of the AUTHOR(S), First name(S) (initials or in full)}. {Thesis title} : {subtitle} {[Electronic medium]}. {Site of presentation} : {Institution where the thesis was defended}, {date (year of defense)} {[cited DATE]}. {Pagination}. {Notes}. {Available from Internet: <URL>}.

GRIGÓRIO, Deise de Araujo. Teses e dissertações em saúde pública e portarias do Ministério da Saúde : estudos de uma década sob a ótica do DECS. Rio de Janeiro : Fundação Oswaldo Cruz, Escola Nacional de Saúde Pública; 2002. 136 p. Obtenção do grau de Mestre.

GRIGÓRIO, Deise de Araujo. Teses e dissertações em saúde pública e portarias do Ministério da Saúde : estudos de uma década sob a ótica do DECS [online]. Rio de Janeiro : Fundação Oswaldo Cruz, Escola Nacional de Saúde Pública; 2002 [cited 20 March 2005]. 136 p. Obtenção do grau de Mestre. Available from Internet:
 <http://portalteses.cict.fiocruz.br/transf.php?script=thes_cover&id=000117&lng=pt&nrm=iso>.

Paragraph style: ReferenceThese

Character style: ReferenceAuthors, ReferenceAuthorSurname, ReferenceAuthorForename, ReferenceTitle, ReferenceSubtitle, ReferenceMediumType, ReferenceLocation, ReferenceAcademicUnit, ReferencePresentationDate, ReferenceCitationDate, ReferencePublicationPages, ReferenceNotes, ReferenceURL

6. Standard

{Author(s)' Organization in Full}. {Title of the standard} : {subtitle}
 {[Electronic medium]}. {Edition}. {Publisher site (City)}, {year of publication}
 {[cited DATE]}. {Pagination}. {Available from Internet: <URL>}.

International Organization for Standardization. ISO 690 : 1987(E) -
 Documentation - Bibliographical References - Content, form and structure.
 2nd. ed. Geneva, 1987. 11 p.

International Organization for Standardization. ISO 12083 : 1998(E) - XML
 document type definition for Books (Draft) [online]. Geneva, 1998 [cited 20
 March 2005]. Available from Internet:
 <<http://www.xmlxperts.com/xmlbookdtd.htm>>.

Paragraph style: ReferenceStandard

Character style: ReferenceAuthors, ReferenceAuthorSurname,
 ReferenceAuthorForename, ReferenceTitle,
 ReferenceSubtitle, ReferenceMediumType,
 ReferenceLocation, ReferenceAcademicUnit,
 ReferencePresentationDate, ReferenceCitationDate,
 ReferencePublicationPages, ReferenceNotes,
 ReferenceURL

7. Legislation

Template 1

{Country, state or municipality}. {Law or Decree, number and date (day of the
 month of the year)}. {Abstract}. {*Publication*}, {Site of publication}, {date
 (month date. year)}. {Section}, {page}.

Brasil. Lei n. 7000 de 20 de dezembro de 1990. Dispõe sobre a proibição de
 pesca. *Diário Oficial da União*, Brasília, 21 de jan. 1991. Seção 1, p. 51.

Paragraph style: ReferenceLaw

Character style: ReferenceAuthors, ReferenceOrgName1, ReferenceOrgName2,
 ReferenceOrgName3, ReferenceTitle, ReferenceSummary,
 ReferencePublisher, ReferenceLocation,
 ReferenceFullDate, ReferenceSection,
 ReferencePublicationPages

Template 2

{Country}. {Title (data), number, date}. {*Legislation title*} : {subtitle}, {month
 (in full)}, {year}, {volume}, {number}, {pages}.

Brasil. Consolidação das Leis do Trabalho. Decreto-lei n. 5452, 1 de maio de 1943. Aprova a consolidação das leis do trabalho. *Lex - Coletânea de Legislação* : edição federal, 1943, vol. 7.

Paragraph style: ReferenceLaw

Character style: ReferenceAuthors, ReferenceOrgName1, ReferenceOrgName2, ReferenceOrgName3, ReferenceTitle, ReferenceSummary, ReferencePublisher, ReferenceLocation, ReferenceFullDate, ReferenceSection, ReferencePublicationPages

Marking Bibliographical References

Suppose you want to mark the reference below:

SÁ, Elisabeth Schneider de, GAUDIE-LEY, Maria Dulce L. de Magalhães, FERREIRA, Ana Lúcia Lima et al. Manual de normalização de trabalhos técnicos, científicos e culturais. Petrópolis, RJ : Vozes, 1994. 184 p. ISBN 85-326-1181-8.

First of all, one must select the type of reference that will be marked in the case of a monograph. Therefore, the paragraph style to be applied is *ReferenceMonograph*.

In order to do it:

1. place the cursor on any part of the reference;
2. apply the style **ReferenceMonograph**.

To undo it:

1. select the whole paragraph;
2. apply the style **Clear Formatting**.

In order to mark the styles of characters associated to the reference elements one must have in mind the reference's template.

Note, for example, that the authors' subsection at a reference may have one or more occurrences of authors and even different types of authors (person or institution).

To mark the authors in the example's reference:

1. Select from "SÁ, Elisabeth ..." to "... Ana Lúcia Lima et al.";
2. Apply the character style `ReferenceAuthors`;
3. Select each author's surname individually, without comma;
4. Apply the character style `ReferenceAuthorSurname`;
5. Select the first name and the middle name of each author individually, without the comma;
6. Apply the character style `ReferenceAuthorForename`;

In the example below we have a reference with the institutional author:

Universidade de São Paulo. Sistema Integrado de Bibliotecas. Grupo DiTeses. Modelos de referências para dissertações e teses. In: UNIVERSIDADE DE SÃO PAULO. Sistema Integrado de Bibliotecas. Grupo DiTeses. Diretrizes para apresentação de dissertações e teses da USP : Document eletrônico e impresso. São Paulo : SIBi-USP, 2004. 110p. ISBN 85-7314-023-2.

In order to mark the institutional author correctly:

1. Select from "Universidade..." up to "...Grupo DiTeses";
2. Apply the character style `ReferenceAuthors`;
3. Select "Universidade de São Paulo" (no stop);
4. Apply the character style `ReferenceOrgName1`;
5. Select "Sistema Integrado de Bibliotecas";
6. Apply the character style `ReferenceOrgName2`;
7. Select "Grupo DiTeses";
8. Apply the character `ReferenceOrgName3`;

All types of electronic documents must be identified with the three styles available:

`ReferenceMediumType`, `ReferenceCitationDate` and `ReferenceURL`

In `ReferenceMediumType`, we have four possible values:

- online;
- CD-ROM;
- magnetic tape;
- disk.



When the document is online, there is no need for the fields Place of publication and Publisher.
 When a location field has no content it must be filled out with "s.l."
 When a location field has no content it must be filled out with "s.d."
 When the editor field has no content it must be filled out with "s.n."

The table below was designed to clearly depict the hierarchy of characters' styles.

It shows the relationship among the elements described in the templates and the character styles available, as well as the similarities and dependencies among the various elements.

The inexistence of a defined "parent style" means that there is no hierarchical nesting at the character level.

Element	Character style	Parent style	
Author(s)' Surname(s)	ReferenceAuthorSurname	ReferenceAuthors	
Surname(s) of the Author(s) of the publication			
First name(s) (initials or in full)			ReferenceAuthorForename
Author(s) organization in full			ReferenceOrgName1 ReferenceOrgName2 ReferenceOrgName3
Country, state or municipality			
Surname(s) of the author(s) of the reference part	ReferenceAuthorSurname	ReferenceAuthorsPart	
First name(s) (initials or in full) (part)	ReferenceAuthorForename		
Title of the work	ReferenceTitle	-	
Thesis title			
Title of the standard			
Law or Decree, number and date (day of the month of the year)			
Legislation title			
Article title			ReferenceArticleTitle
Title of the reference work	ReferenceTitlePart	-	
Title (data), number, date			
Subtitle	ReferenceSubtitle		ReferenceTitle
Translation	ReferenceTranslation		
Edition	ReferenceEdition		
Location of publication (City)	ReferenceLocation		
Place			
Place of delivery			
Publisher	ReferencePublisher		
Publication			
Publication date	ReferencePublicationYear		
Year			
Starting year of publication			
Last year of publication			
Pagination	ReferencePublicationPages		
Initial and final pagination of article			
Page(s)			
ISBN	ReferenceISBN		
Title of the publication	ReferenceSerialTitle		

Element	Character style	Parent style
ISSN	ReferenceISSN	
Month (in full)	ReferencePublicationMonth	
Volume	ReferenceVolume	
Fascicle	ReferenceIssue	
Issue		
Notes	ReferenceNotes	
Organization where thesis was defended at	ReferenceAcademicUnit	
Date (year when defended)	ReferencePresentationDate	
Abstract	ReferenceSummary	
Date (day, month, year)	ReferenceFullDate	
Section	ReferenceSection	
[Electronic medium]	ReferenceMediumType	
[DATE cited]	ReferenceCitationDate	
Available from Internet: <URL>.	ReferenceURL	



All character styles are necessarily subordinated to the paragraph style, which defines the type of reference being marked.

We notice that the table has elements marked with the same character style, which are therefore grouped in the second column.

For information on how to write Bibliographical References in compliance with this manual, refer to standards ISO 690 (10) e ISO 690-2 (11).

Creating the Glossary

Defining the scope

Your document's glossary must reflect the terms and words specific to the corresponding subject matter, assuming that the user is not familiar with said terms or has only a basic knowledge of them.

The choice of terms is normally a subset from the list of words and terms from the indexing or from a previously defined set of words.

Creating the articles

This template's glossary articles are rather simple and consist of an entry and a body, in that the latter may be broken down into description and citation.

Ex.

Word entry. Set of meanings referring to a word. Smallest element in a dictionary, consisting of an entry and its respective meaning(s).

Articles' entries must necessarily be included in the Index's word list.

About the Appendices

Appendixes may or may not be included in the document, at the author's discretion, as they may or may not be needed. The structure usually follows a document's chapter, in that it may have all the elements included in a regular chapter.

Appendixes generally consist of supplementary material, not directly connected to the document's scope, but supplementing it or enabling the user to obtain more parameters on the documents' subject. These are appendixes whose content the author considers to be relevant reference material to the reader.

The appendixes must not cover topics already defined as *Glossary* and *Bibliographical References*.

Creating an Index

In previous versions of Word processors, generating an index would normally take weeks, as it was necessary to mark each word to be included in the index before generating it. However, after the *Microsoft Office XP Professional* the user has a feature that enables automatic marking of the table of contents list of words and /or predefined terms.

Naturally, a good knowledge of the document's subject matter is required, so a good index may be generated.

As far as macro-activities are concerned we have:

1. creation of a list of terms and words that may interest the user of the document during its use;
2. review the list based on semantic criteria to determine variables, synonyms, antonyms and possible homonyms to be included or discarded;
3. choose standardized entries for all elements in the list, including variables and synonyms;
4. entering according to the format required by MS-Word;
5. marking the document in automatic mode;
6. generating the index.

Creating a list of terms and words

Creating a list of words may, at first, seem to be a simple task but, even for the document's author, the practice shows exactly the opposite. It is hard to reach a consensus in terms of vocabulary desired for the index but the author or the reviewer may be equipped with data to minimize this process.

Another technique used to define the network of words for dictionaries is to generate a list of words occurring in the document which, after an analysis, proves to be helpful in determining the best range of occurrences to be considered, as the case may be (dictionaries, tables of contents, etc).

Overall, the process is made up of the following steps:

1. in MS-Word, only the nucleus of the document (without summary, list of figures, title page, copyright) is saved in a text file with the option **Insert line breaks**;
2. a counting process is conducted, having as parameters the name of the file generated in item 1 and the name of a file with HTML extension to accommodate the list generated;
3. by making the HTML file editor/author generated in step 2 the most relevant words are selected;
4. the list is generated with the selection made by the editor.

Reviewing the list

This phase of the work is purely intellectual and there are good utility programs that may help the author, such as thesaurus and technical glossaries and, of course, dictionaries, where one can look for antonyms, synonyms, variables and homonymous words before confirming or deleting the term from the list.

Generally speaking, words whose meaning differs according to their function in the sentence should be excluded from the index or considered to be replaced by a double-term, in order not to confuse the reader.

Standardizing the entries

This phase is basically a review of the style, where the author determines whether he/she prefers to use verbs in the infinitive or gerund, nouns in singular or plural, etc.

Usually, the standard format is to have entries in the singular and verbs in the infinitive tense.

However, the hardest part is to choose, from a number of synonyms and variables of a given word in the list, which is the most appropriate term to be used in the entry.

Creating the concordance file

Having the final list of words, synonyms, variables and the standardized entry, we are ready to start typing the concordance file, which will be used by MS-Word to mark the document

There are basically two phases:

a) PHASE 1

1. Open MS-Word;
2. Select

--

,

--

,

--

;
3. In

--

 enter 2;
4. In

--

 enter 1;

5. Select the option **AutoFit to window**;
 6. Click on the **OK** button;
 7. In the first column enter the Word or term that must be searched in the document to mark the entries;
 8. In the second column enter the word or term that should figure in the index.
- b) PHASE 2:

To each new entry, do as follows:

1. Place the cursor at the beginning of the first column on the last line of the table;
2. Select **Table**, **Insert**, **Rows Below**;
3. Proceed to steps 7 and 8 of Phase 1.

It is possible to define subentries in column 2, you only need to enter the term of the main entry, followed by colon (:) followed by the term subentry.

Generating the index

Before generating the index, the terms and the words that make the concordance files must be marked. As this procedure will change the document's text we suggest that a backup of the text be created before going on.

Marking the entries automatically



This step is not required if the document is being migrated and already has index markings.

Selecting only what must be marked

The automatic marking of the index considers the entire document, thus including –undesirably– the Table of Contents and the Table of Figures.

In order to avoid that terms from the Table of Contents and of the Table of Figures be marked and later included in the Index, one must do as follows:

1. Open the document to be marked in MS-Word;
2. Move the cursor to the Table of Contents;

3. Select the entire content of the Table of Contents (in grey) using the cursor arrows;
4. Place the mouse at the beginning of the text selected clicking with the right button of the mouse and selecting the option **Toggle Field Codes.**

This procedure will convert the content of the table of contents in a code field.

Repeat steps 3 & 4 for the Table of Figures.

Conducting automatic marking proper

1. Select **Insert**, **Reference**, **Index and Tables**;
2. In the Index box, select the button **AutoMark**;
3. Select the name of the concordance file and click on the **Open**.

The MS-Word will do all the marking according to the list in the concordance file.

Putting back the content of the Table of Contents and Table of Figures

After marking the words, follow the steps to show the contents of the Table of Contents and the Table of Figures:

1. Place the mouse on the code field clicking with the right button and selecting **Update Field**;
2. Select the option **Update entire table**;
3. Click on the **OK** button;

Creating the index

1. Place the cursor at the place where the index is to be created;
2. Select **Insert**, **Reference Insert**, **Reference**, **Index and Tables**;
3. In the **Index** Box select in the **formats formats** field the **Formal** option;
4. Click on the **OK** button to confirm.

Generating the Table of Figures

The Table of Figures section is similar to the Table of Contents, however, it is specific to images and illustrations and can only be used if the illustrations' legends have been adequately marked with figure styles (*Figure*, *FigureLabel*).

In order to generate this table:

1. Make sure the index fields preview option is turned off;
2. Click on the option **Insert** of the menu;
3. Select **Reference** and then **I Index and Tables**;
4. Select the table **Table of Figures**;
5. Click on the **Options**;
6. Mark the field **Style** and select the style **FigureLabel**;
7. Click on the **OK** button to confirm the style; Click on the **OK** button to confirm the inclusion on the table of contents.

Generating the Table of Contents

The template's table of contents has been predefined in order to make it easier for the user to update its contents whenever necessary. Before doing it, the index fields' preview must be disabled as they would end up migrating to the table of contents. The steps to update the table of contents are as follows:

1. Click with the right button of the mouse on the table of contents text (in grey);
2. Select **Update field**;
3. Select the option **Update entire table**;
4. Click on the **OK** button;

Sometimes the user may have problems updating the predefined table of contents.

For this reason, we describe below the steps to recreate the table of contents:

1. Delete all paragraphs in the summary, except for the title;
2. Place the cursor wherever you want to insert the new table of contents;
3. Select **Insert**, **Reference**, **Index and Tables**
4. Select the tab **Table of Contents**;
5. Select **Options**;
6. In the section **Available Styles** keep the number in the field **TOC Level** only for the styles below:
 - Heading 1
 - Heading 2
 - Heading 3
 - Heading 4
7. Click on the **OK** button to confirm the options;
8. Click on the **OK** button to confirm the table of contents insertion.



Always review the entire list of styles available before including the table of contents.

Migrating a document to the new template

Migrating a document previously written in MS-Word to the new template may seem complicated. However, several aspects are already solved by the template definition itself.

Obviously, the margins, spaces, fonts, type sizes, etc are elements that may change. However, this change should be seen as a challenge that will be compensated by a cleaner, more objective and more modern final document, enabling a more pleasurable reading experience to the user, rather than a torture.

In this chapter we present the steps to migrate a typical MS-Word document to the new template.

Creating a backup of the master document

1. Open the document in MS-Word;
2. Select **File**, **Save as**;
3. Add an expression such as "original" or "backup" (without quotation marks) to the name of the document or else a date in ISO format (20050223, for example);

4. Click on the **Save** button.

Cleaning up the document



Make sure the document has neither comments nor reviews to confirm and that the option **Track Changes** is disabled before proceeding to run the cleaning macro.

1. Open the document in MS-Word;
2. Select **Tools**, **Templates and Add-Ins**;

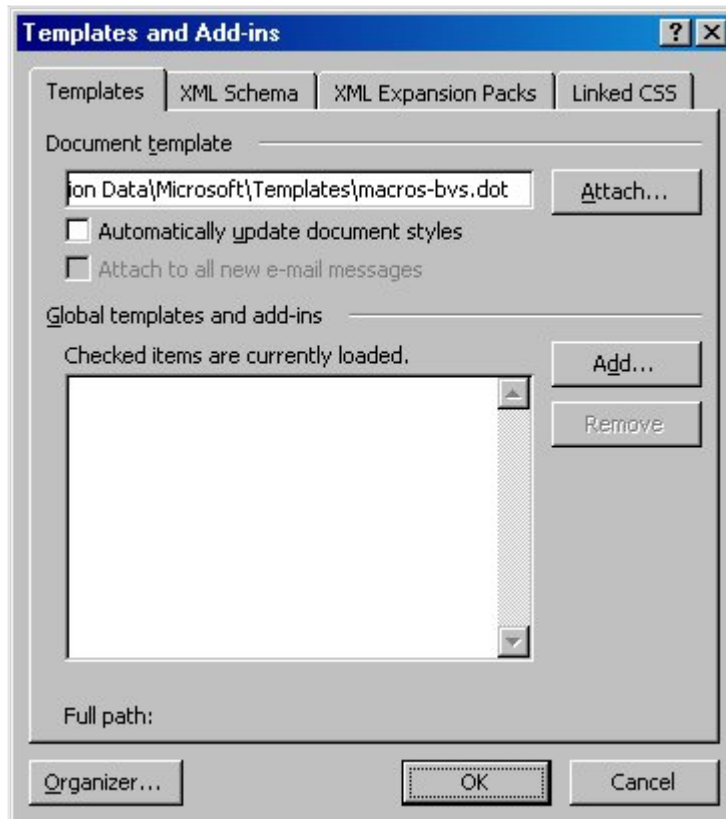


Fig. 19 – Window for managing templates.

3. Click on the **Attach** button;
4. Select the template named `macros-bvs.dot`;
5. Click on the **Open** button;
6. Click on the **OK** button;
7. Select **Tools**, **Macro**, **Macros**;;

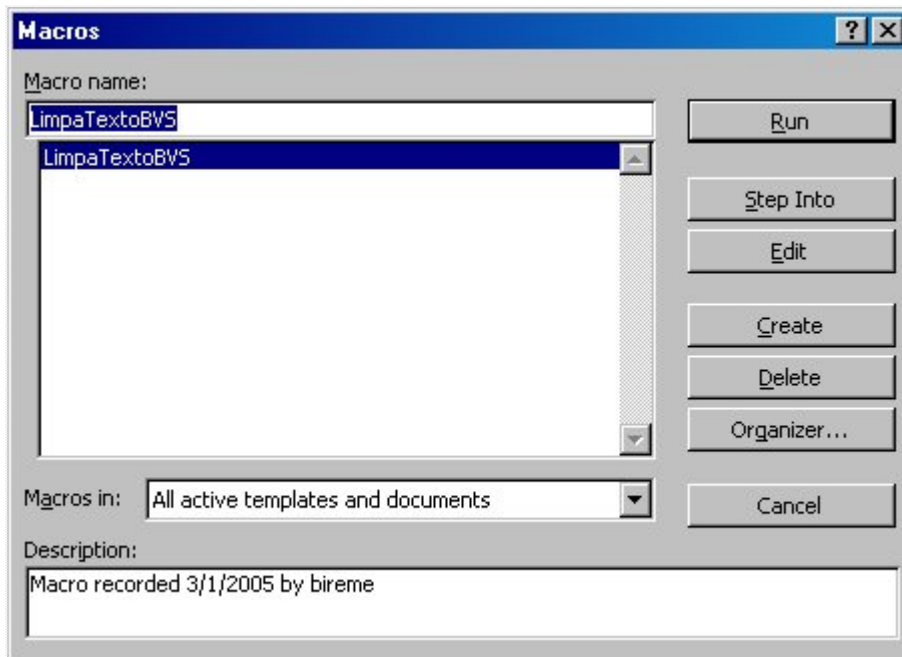


Fig. 20 – Detail of the window to select and run macros.

8. Select the macro `LimpaTextoBVS`;
9. Click on the **Run** button.



The cleaning macro is fast and should not take more than 30 seconds to run.
In case the operation repeats itself on and on in a given item and does not finalize, hold the keys **Ctrl** and **Break**, simultaneously.
Click on the **End** button to confirm that the end of the operation. This does not mean that the macro has not run correctly but only that a condition has been found that cannot be adequately treated by the program.

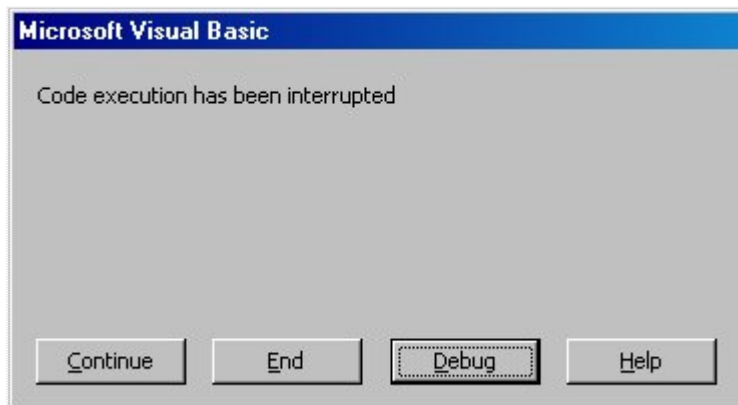


Fig. 21 – Detail of the window to cancel the running of macros.

Eliminating sections that will be supplied by the template

Since the template already has all the sections required to a standardized document, we suggest that the user should exclude from the document the following sections:

1. cover;
2. title page;
3. methodology documents' set;
4. table of contents.

Only the text relative to the subject of the manual and its appendixes should be left in the text.



Don't forget to keep a backup copy of the original document before performing any changes.

Eliminating headers and footers that will be supplied by the template

The template already has the headers and footers required by the document, therefore, existing headers and footers should be excluded before attaching the template to the document.

Attaching the template to the existing document

1. Open the document in MS-Word;
2. Select **Tools**, **Templates and Add-Ins**
3. Click on the **Attach** button;
4. Select the template named `bvs-template.dot`;
5. Click on the **Open** button;
6. Click on the **OK** button;

Applying the template's format

Follow the steps described in *Creating the text of the manual or guide* in the chapter *Using the template to start a new document*.

After reformatting the content of the manual, save it so that we may proceed to the next step, where we will recreate the structure of the manual according to the new template, with its content.

If images and charts are marked as indicated in the topic Applying styles for images and graphs in the chapter *Using the template to start a new document* the “Table of Figures” can be generated. For more information about generating the table of figures, refer to the section Generating the Table of Figures in the same chapter.

Recreating the document will all the sections

When we apply the template to an existing document, the MS-Word will only update the list of styles, page format and updates the format according to the new template.

However, the document template offered has several predefined sections, containing a predefined text and defined fields in the area of documents' properties, the contents of which can only be used if we create a new document.

Thus we will now recreate our final document following the steps below:

1. Create a new document and follow the script defined in the chapter *Using the template to start a new document*, as described below:
 - a) Creating a new document
 - b) Customizing the new document
 - c) Updating the fields' preview in the document;
 - d) Updating the data in the Card Catalog;
2. Open the document containing the text of the manual and do as follows:
 - a) delete the title page, the table of contents, the headers and the footers;
 - b) select the entire text and copy it to the new document in the section immediately after the preface
 - c) save the new file with the name of your choice.

Now it is necessary to:

1. review the document to see if part of the text has been lost or undergone undesirable changes after the migration;
2. check the topics below from the chapter Using the template to start a new document so that the manual has all mandatory sections according to the template:
 - a) Updating the Acknowledgements page
 - b) Updating the citation page
 - c) Updating the section Set of documents on the methodology;
 - d) Updating the page with Abbreviations used;
 - e) Creating the session How to use this manual;
 - f) Updating the section *About the Methodology* in the Preface;
 - g) Creating Bibliographical References
 - h) Creating the Glossary;
 - i) About the Appendixes
 - j) Creating an Index
 - k) Generating the Table of Figures
 - l) Generating the Table of Contents

Special Situations

In this chapter we will see what to do in special situations that might occur.

Excluding an optional section

1. You can view the characters by clicking on the button **Show/Hide;**

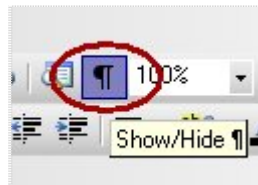


Fig. 22 – Detail of the button Show/Hide.

2. Select all paragraphs of the section to be deleted;
3. Deactivate the characters view by clicking on the button **Show/Hide;**



If there is a section break mark, this should also be deleted.



Fig. 23 – Example of a section break.

Creating additional styles

1. Select **Format**, **Styles and formatting**;
2. Click on the **New Style**
3. Enter a name for the style in the field **Name**;
4. Select the type of style in the field **Style type**;
5. Select an existing style as a basis for the style being created in the field **Style based on**;
6. Select the option **Add to template**;
7. Click on the **Format** button if you want to change the format.

Generating the PDF file

There are several ways to generate the PDF file in the document, as follows:

- Using the . filter in *Adobe Acrobat*.
- Using a public filter called *PDF995*.
- Using the sites *ps2pdf* or *doc2pdf*.

In the first case, we assume that a licensed version of the *Adobe Acrobat Professional* is available, enabling the user to create PDF files, with the entire range of options available in this format, such as the inclusion of internal and external links, creation of bookmarks and controls for font conversion, style and file size. Although this is the best option, it is also the most expensive.

The second case (*PDF995*) is a *shareware* for public use, as long as the file generated is not part of a commercial package and contains a god filter for Windows-standard fonts. The weak point is that there is no control for link creation (internal or external), nor for styles.

The third case is an on-the-fly conversion service for PS-format files (*PostScript*) or DOC (Word-native). Additionally, it does not enable a control over the creation of links, nor of styles, being at the mercy of the existing connection.

Let's have a look at the steps for crating files in each one of the options:

- Adobe Acrobat

a) Before proceeding to any conversion, check the options available:

1. Select the option **Adobe PDF** in the MS-Word menu bar;
2. Select **Change Conversion Settings**;
3. Check the existing options and proceed to the desired selection.



Explaining the operation and configuration of the Adobe Acrobat is not within the scope of this manual.

b) For the conversion:

1. Open the document to be converted in MS-Word;
2. Locate the area with the Acrobat buttons in the main window;

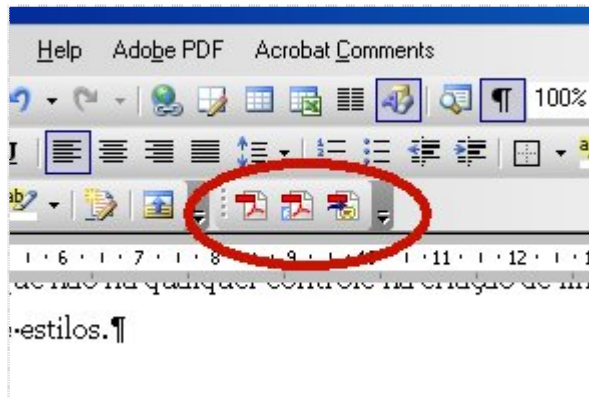


Fig. 24 – Detail of the area with Adobe PDF buttons

3. Click on the button **Convert to Adobe PDF**;
4. Follow the instructions on the screen;
5. Confirm the updating of the table of contents;
6. When prompted by the window to provide a name for the file, enter a name and then press **OK**;
7. Wait until the file is generated.

- PDF995

1. Open the document to be converted in MS-Word;
2. Select **File**, **Print**;
3. In the area **Printer**, select the printer **PDF995**;

4. Click on the **OK** button to confirm;
5. Confirm the updating of the table of contents;
6. When prompted by the window to provide a name for the file, enter a name and then press **OK**;
7. Wait until the file is generated.



It is assumed that the user has the software installed in his equipment.

- Sites doc2pdf and ps2pdf
 1. Open an Internet navigator;
 2. Enter one of the addresses below:
 - ◇ <http://www.doc2pdf.net/>
 - ◇ <http://www.ps2pdf.com/convert/index.htm>
 3. Follow the instructions on the screen, providing a DOC file (word Native) or a PS (PostScript) file.

Attaching an alternative template

1. Open the document in MS-Word;
2. Select **Tools**, **Templates and Add-Ins**;
3. Click on the **Attach** button;
4. Select the template desired;
5. Click on the **Open** button;
6. Select the option **Automatically update document styles**;
7. Click on the **OK** button;

Applying the special format for the style *Notes*

Optionally, one may wish to highlight the notes and observations in the text, for the style format in the Notes is basically the same as the style in the normal text.

As we cannot combine elements such as tables and images in the style, we chose to create a previously formatted text, saved with the feature "AutoText" in MS-Word.

To format a paragraph with this standard:

1. Select the option **Show/Hide** to enable the preview of control characters;
2. Create an empty paragraph above the paragraph to be formatted;
3. Select **Insert**, **AutoText**, **Notes**, **!Notes**;
4. Cut and paste the content of the paragraph to be formatted for the second table created by the *AutoText* feature.

Template Structure

This chapter presents the elements of the user's document template for a VHL application or program.

ISO and ABNT standards included in the Bibliographical References chapters at the end of this document were used as reference to define the structure and the elements.

Template Structure

The template is divided into:

Title Page

The first page of the document, containing the name of the institution, the name of the methodology (if applicable) the title of the document, the version of the document, the place and the year of its publication. This page is mandatory and its contents are automatically updated when the property fields are filled out in the document.

Copyright note, Card catalog and data about the institution

This page contains the copyright note, the name of the institution that holds the right, the title of the methodology and of the document, the Card Catalog, the notes, the terms of responsibility and use, etc. This page is mandatory, in that some of its elements are optional. Its contents are automatically updated when the document's properties fields are filled out.

Acknowledgement

Optional page containing a thank you note to the people and/or institutions that have collaborated to create the document.

Citation

Optional page containing one or more citations by the author or third parties.

Set of documents on the methodology

This page contains a list of the documents relative to a given methodology where the current document is included. This page is mandatory whenever the number of documents is equal to or larger than two and there is an associated methodology.

Table of Contents

This section describes the titles of chapters, subtitles and document sections with the respective starting pages for each element. This section is mandatory and will be automatically generated based on the marking of certain paragraph styles.

Table of figures

Section containing the list of illustrations and figures, charts and tables in the document. This section is mandatory and will be automatically generated based on the marking of certain paragraph styles. For more information refer to the section *Generating the table of figures*.

Abbreviations used

Mandatory section containing a list of the abbreviations used with their respective text in full in the original language, followed by their translation, as required.

How to use this manual

Mandatory section explaining how the user should use this document. It includes two topics: structure and conventions used.

Preface

Mandatory section containing a basic text about the institution on the VHL and on the methodology (if applicable).



Texts relative to Bireme and the VHL must be kept as indicated in the template and may only be changed with the authorization of the administration.

Text in the manual

Set of chapters that make up the manual or the guide itself. The Bibliographical References and the glossaries are two separate sections in the template. Division of the content in chapters, parts, sections, etc. will be decided by the author of the manual or guide.

Bibliographical References

This is a mandatory section containing the Bibliographical References used in the document, in compliance with the ISO standards.

Glossary

A mandatory section containing the concepts and definition of terms associated to the methodology or technology that are relevant to a glossary.

Appendices

Set of specific information supporting the central subject matter of the document. These may be tables, statistics, reports, etc. This section is optional and, if used, must be numbered in Roman numerals. It must be used to refer to any appendices required.

Index

This mandatory section is designed to offer the reader a list of terms and keywords in alphabetical order representing a synthesis of the relevant subjects found in the work, indicating the pages where they occur. This section will be automatically generated, based on a list of keywords chosen by the author(s) of the document.

Elements of the structure

This section presents the elements that make up the structure of the document template and is basically formed by fields and styles.

Document fields

The fields in the document have been defined with the objective to standardize the information that will be used more than once in the publication, in texts whose content the user is not required to edit.

Using the option **FileF**, **Properties** we have Access to the table of fields in the document.

In the **Summary** section we have the fields for global use, predefined in the template, and it is mandatory that they be filled out.

1. Author
Contains the name(s) of the author(s) of the document.
2. Company
Contains the name of the institution. This field is predefined with the value "BIREME / PAHO/ WHO".
3. Title
Contains the name of the file containing the current document. It must not be mistaken for the document's title.

In the **Custom** section we have the fields which have been created specifically for this template, of mandatory fill-out, listed below:

1. CompanyAddress
Contains the institution's address. Used in the copyright page.
2. CopyrightYear
Contains the document's year of publication. Used on the copyright page and on the title page.
3. Country
Contains the country of publication of the document, in Portuguese and in full. Used in the Card catalog
4. DocumentTitle
Contains the title of the document. Used throughout the document.
5. DocumentVersion
Contains the version of the document in Arabic numerals. Used in the title page.
6. EditingPlace
Contains the name of the locality of publication. Used in the title page, in the Card catalog and in the copyright.

7. FullCompanyName

Contains the complete name of the institution. Used in the title page and in the copyright. This field is predefined with "*Centro Latino-Americano e do Caribe de Informação em Ciências da Saúde*".

8. Methodology

Contains the name of the associated methodology. Used in the title page.

9. Language

Contains the two-character ISO identifier relative to the manual language. This field is predefined with the following valid values: en (English), es (Spanish) and pt (Portuguese).

Paragraph styles

The paragraph styles defined in this template enable better information organization and classification and ensure visual and structural uniformity when they are used. Through the use of styles the publication may later be converted into XML format for a database or easily migrated to another word processor or editing program.

The list below describes all paragraph styles available.

Note that these styles impact all characters in the paragraph where they are applied.

Body_*n*_style

Set of styles designed to help format complex item lists, up to four levels below the normal style. The table below shows the hierarchical relationship among the styles within this set compared to the Normal style.

Style	Level				
	5	6	7	8	9
Normal	x				
Body_1		x			
Body_1_Bullet		x			
Body_1_Letter		x			
Body_1_Number		x			
Body_2			x		
Body_2_Bullet			x		
Body_2_Letter			x		
Body_2_Number			x		

Style	Level				
	5	6	7	8	9
Body_3				x	
Body_3_Bullet				x	
Body_3_Letter				x	
Body_3_Number				x	
Body_4					x
Body_4_Bullet					x
Body_4_Letter					x
Body_4_Number					x

CataloguingContent

Mandatory style for the content elements in the *Card catalog*. Used only in the copyright page.

CataloguingSection

Mandatory style for the “*Card catalog*” term. Used only with this title and only in the Copyright page.

CopyrightText

Mandatory style for the Standard text in the *Copyright* page.

CoverCompany

Mandatory style for the institution’s fantasy name or abbreviation. Used only in the *title page*.

CoverCopyright

Mandatory style for the locality and year indicated in the *title page*. Used only in this page.

CoverDocumentTitle

Mandatory style for the title and subtitle of the document, as well as its version.
Used only in the *title page*.

CoverFullCompanyName

Mandatory style for the institution's complete name. Used only in the *title page*.

CoverMethodology

Style for the methodology title (if applicable). Used only in the *title page*. If not applicable, a blank space must be entered.

Entry

Mandatory style for word entries and definitions. Used only in *Glossary* and *Abbreviations* sections.

FakeHead1, FakeHead2, FakeHead3, FakeHead4

Optional styles created based on styles Heading 1, Heading 2, Heading 3 and Heading 4 and used as substitutes so that references to headers are not shown as items in the Table of Contents. FakeHead1 is only used in the *Acknowledgements* and *Table of Contents* sections, when they are mandatory.

Figure

Styles for figures and images Used throughout the publication, but its use is optional. When used, *FigureLabel*, *FigureID* and *FigureRef* must be adequately marked.

FigureLabel

Style used for figure or image legends. Used throughout the publication, but its use is optional. When used, *Figure*, *FigureID* e *FigureRef* must be adequately marked.

Heading 1

Mandatory style for chapter titles. Used throughout the publication.

Heading 2

Mandatory style for chapter sections. Used throughout the publication.

Heading 3

Mandatory style for chapter subsections. Used throughout the publication.

Heading 4

Mandatory style for chapter subsections topics. Used throughout the publication.

Item

Optional style for topic items. Used throughout the publication.

MyTable

Generic style optionally used for tables. Used throughout the publication.

Normal

The standard style for the text.

Notes

Standard style for texts like notes, observation, etc. This style may optionally be formatted in compliance with the *Special format* for the *Notes style* in the chapter *Special situations*.

NumberedItem

Optional style for numbered topic items. Used throughout the publication.

OpeningCitation

Optional style that may be used in the citation text. Used only in the Citation page .

OpeningCitationAuthor

Style for the name of the citation's author. Used only in the Citation page .
Mandatory when *OpeningCitation* is used.

ReferenceItem

Generic style to be internally used in the template as a basis for the reference entries in the *Bibliographical References* section.

ReferenceLaw

Mandatory style for entries that are references to legislation. Used in the *Bibliographical References* section.

ReferenceMonograph

Mandatory style for entries that are references to a monograph. Used in the *Bibliographical References* section.

ReferenceMonographPart

Mandatory style for entries that are references to part of a monograph. Used in the *Bibliographical References* section.

ReferenceSerial

Mandatory style for entries that are references to journals. Used in the *Bibliographical References* section.

ReferenceSerialArticle

Mandatory style for entries that are references to journal articles. Used in the *Bibliographical References* section.

ReferenceStandard

Mandatory style for entries that are references to standards. Used in the *Bibliographical References* section.

ReferenceThese

Mandatory style for entries that are references to thesis. Used in the *Bibliographical References* section.

SectionIdentifier

Restricted and mandatory style for the identifier of the section or page where the section starts. Used throughout the publication. This style is reserved.

Subitem

Optional style for topic subitems. Used throughout the publication.

TableObject

Generic style optionally used for tables imported from other documents. Used throughout the publication.

Character styles

These styles complement the function to organize the information, detailing the text elements in a level comparable to fields.

Applying a character style impacts only the character where the cursor is placed or the characters of a previous selection. These are the styles we use to format words and sentences in bold, italics or different colors, font sizes, etc.

EntryDescription

Mandatory style for the descriptive text in a word entry. Used only in *Glossary* and *Abbreviations* sections.

EntryDescriptionCitation

Mandatory style for citations in the descriptive text in a word entry. Used only in *Glossary* and *Abbreviations* sections.

EntryHeadandatory style for the text in a word entry. Used only in *Glossary* and *Abbreviations* sections.

FigureID

Style for the identifier of figures and images. Used throughout the publication and mandatory, if *Figure* is used.

FigureRef

Style for the image or figure itself. Used throughout the publication and mandatory, if *Figure* is used.

FixedFont

Optional style for texts with fixed spacing for the fonts. Used throughout the publication.

ProgCommands

Optional style for program commands during an instruction. Used throughout the publication.

ReferenceAcademicUnit

Style for the name of the academic institution where the thesis was presented. Used only in the *Bibliographical References* section.

ReferenceArticleTitle

Style used for the title and subtitle of journal articles. Used only in the *Bibliographical References* section.

ReferenceAuthorForename

Style used for the first name of the author in reference. Used only in the *Bibliographical References* section.

ReferenceAuthors

Style used for the authors of a reference. Used only in the *Bibliographical References* section.

ReferenceAuthorsPart

Style used for the authors of a monograph part in a reference. Used only in the *Bibliographical References* section.

ReferenceAuthorSurname

Style used for the last name of the author in reference. Used only in the *Bibliographical References* section.

ReferenceCitationDate

Style used for the citation date of a document in electronic medium. Used only for electronic documents. Requires the use of styles *ReferenceMediumType* and *ReferenceURL*.

ReferenceEdition

Style for the edition in the reference. Used only in the *Bibliographical References* section.

ReferenceFrequency

Style for the frequency of the journal. Used only in the *Bibliographical References* section.

ReferenceFullDate

Style for the complete date in reference of journal article. Used only in the *Bibliographical References* section.

ReferenceGrade

Style for the thesis title/degree. Used only in the *Bibliographical References* section.

ReferenceISBN

Style for the *ISBN* code in the reference. Used only in the *Bibliographical References* section.

ReferenceISSN

Style for the *ISSN* code in the reference. Used only in the *Bibliographical References* section.

ReferenceIssue

Style for the number of a journal fascicle. Used only in the *Bibliographical References* section.

ReferenceLocation

Style used for the location of the publication in reference. Used only in the *Bibliographical References* section.

ReferenceMediumType

Style for the type of medium in an electronic document. These may be: online, CD-ROM, magnetic tape or disk. Used only for electronic documents. Requires the use of styles *ReferenceCitationDate* e *ReferenceURL*.

ReferenceNotes

Style used for notes and additional information in the references. Used only in the *Bibliographical References* section.

ReferenceOrgName1

Style for the name of the institution in the reference. Used only in the *Bibliographical References* section.

ReferenceOrgName2

Style used for the name of a division within the institution defined in *ReferenceOrgName1*. Used only in the *Bibliographical References* section.

ReferenceOrgName3

Style used for the name of a subdivision within the institution defined in ReferenceOrgName1. Used only in the *Bibliographical References* section.

ReferencePresentationDate

Style used for the thesis' presentation date. Used only in the *Bibliographical References* section.

ReferencePublicationChapter

Style used for the title of a chapter in the publication. Used only in the *Bibliographical References* section.

ReferencePublicationMonth

Style used for the month of publication of articles in journals. Used only in the *Bibliographical References* section.

ReferencePublicationPages

Style used for the number of pages in the document or pages in part of a monograph or journal article. Used only in the *Bibliographical References* section.

ReferencePublicationYear

Style used for the year the work was published. Used only in the *Bibliographical References* section.

ReferencePublisher

Style used for the name of the publishing house that issued the work. Used only in the *Bibliographical References* section.

ReferenceSection

Style used to indicate the section in a legal document. Used only in the *Bibliographical References* section.

ReferenceSerialTitle

Style used for the title of the journal. Used only in the *Bibliographical References* section.

ReferenceSerieNumber

Style used for the series number of a journal. Used only in the *Bibliographical References* section.

ReferenceSubtitle

Style for the subtitle of a monograph or article. Used only in the *Bibliographical References* section.

ReferenceSummary

Style used for the amendment in a legal document. Used only in the *Bibliographical References* section.

ReferenceTitle

Style used for the subtitle of a monograph or regulation. Used only in the *Bibliographical References* section.

ReferenceTitlePart

Style used for the title of part of a monograph (chapter, section, etc.). Used only in the *Bibliographical References* section.

ReferenceTranslation

Style used to provide information about the translation. Used only in the *Bibliographical References* section.

ReferenceURL

Style used for the URL format address in a document. Used only in the *Bibliographical References* section.

ReferenceURLAccess

Style used for the URL Access date as defined in ReferenceURL. Used only in the *Bibliographical References* section.

ReferenceVolume

Style used for the journal volume. Used only in the *Bibliographical References* section.

Hierarchy of styles

In hierarchical terms, the styles may be structural, simple or complex. Actually, the structural styles may also be complex (and usually are).

Structural

These are styles that allow navigability and information generation from their contents. As an example, we have the styles of topics (Headings) that enable the automatic generation of Table of Contents in the publication.

The styles of topics comprise (Heading 1 to 4).

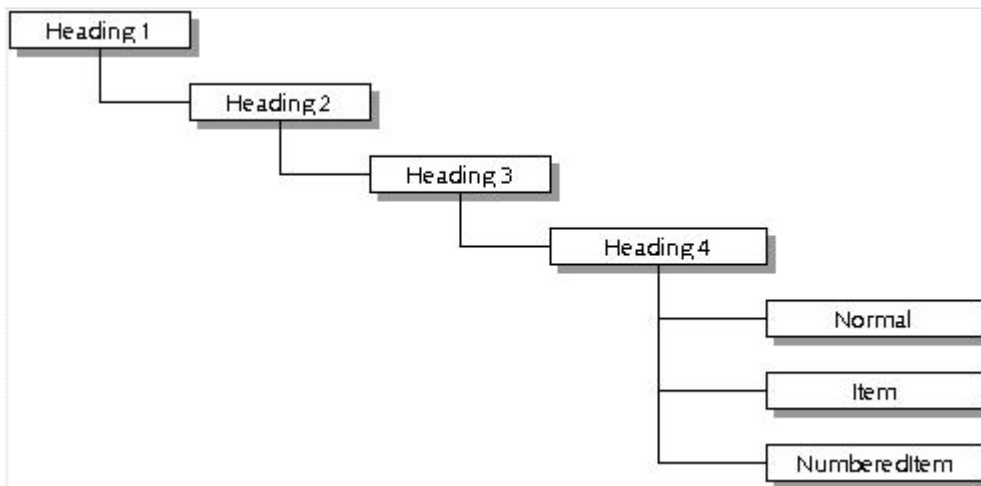


Fig. 25 – Hierarchy of structural elements.

Simple

Styles that combine a paragraph style and two or more character styles in a direct arrangement. There are no sub-trees nor dependencies.

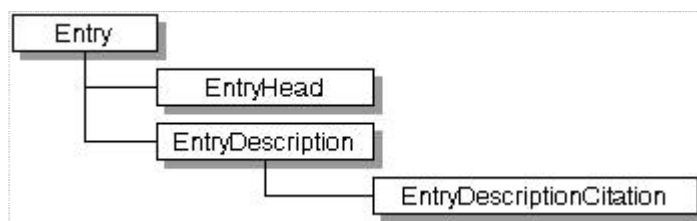


Fig. 26 – Hierarchy of simple elements.

Complex

These styles combine a style of paragraph and several character styles in recurring or dependency arrangements.

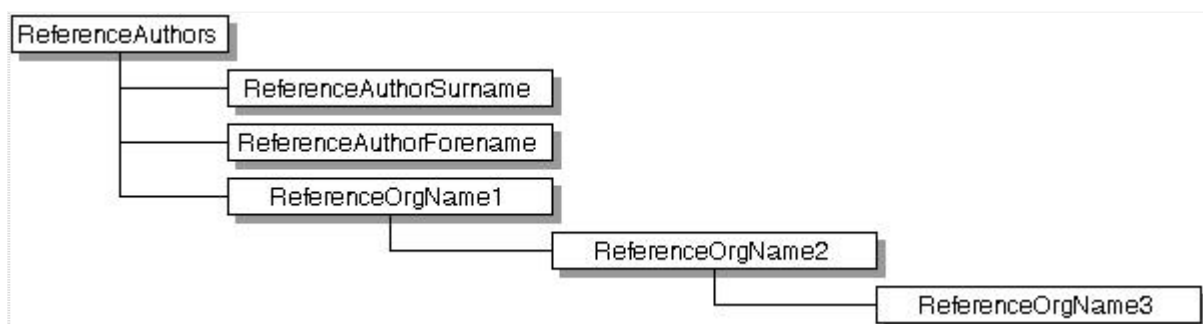


Fig. 27 – Hierarchy of complex elements.

Note that ReferenceAuthors and ReferenceTitle are elements containing subdivisions with items that vary according to the reference type.

For example, a reference to a monograph may have one or more authors and may have a corporate author which is also called institutional author.

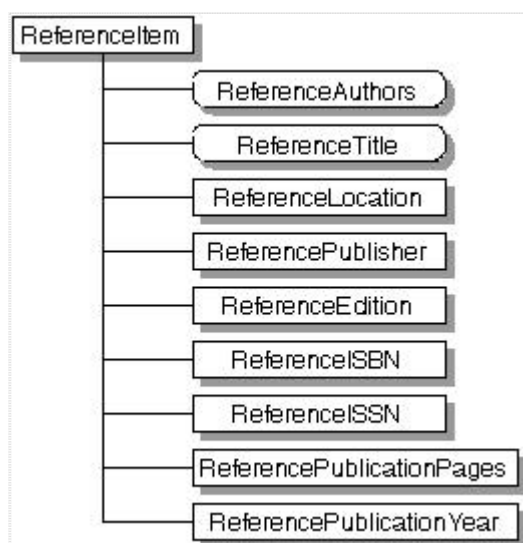


Fig. 28 – Hierarchy of complex elements (continued).

Comparative hierarchy

Next we describe all styles, according to level, for hierarchical comparison purposes.

Style	1	2	3	4	5	6	7	8	9	10
Heading 1	X									
Heading 2		X								
Heading 3			X							
Heading 4				X						
FakeHead1					X					
FakeHead2					X					
FakeHead3					X					
FakeHead4					X					
Normal					X	X	X	X	X	X
Notes					X					
FixedFont						X				
Item						X				

Style	1	2	3	4	5	6	7	8	9	10
Subitem							X			
NumberedItem						X				
Body_1						X				
Body_1_Bullet						X				
Body_1_Letter						X				
Body_1_Number						X				
Body_2							X			
Body_2_Bullet							X			
Body_2_Letter							X			
Body_2_Number							X			
Body_3								X		
Body_3_Bullet								X		
Body_3_Letter								X		
Body_3_Number								X		
Body_4									X	
Body_4_Bullet									X	
Body_4_Letter									X	
Body_4_Number									X	
CataloguingSection					X					
CataloguingContent					X					
CopyrightText					X					
CoverCompany					X					
CoverCopyright					X					
CoverDocumentTitle					X					
CoverFullCompanyName					X					
CoverMethodology					X					
Entry					X					
EntryHead						X				
EntryDescription						X				
EntryDescriptionCitation							X			
Figure					X					
FigureID						X				
FigureLabel					X					
FigureRef						X				
MyTable					X					
OpeningCitation					X					
OpeningCitationAuthor					X					
ReferenceItem					X					
ReferenceLaw					X					
ReferenceMonograph					X					
ReferenceMonographPart					X					
ReferenceSerial					X					
ReferenceSerialArticle					X					

Style	1	2	3	4	5	6	7	8	9	10
ReferenceStandard					X					
ReferenceThese					X					
ReferenceAcademicUnit						X				
ReferenceArticleTitle						X				
ReferenceAuthors						X				
ReferenceAuthorsPart						X				
ReferenceAuthorSurname							X			
ReferenceAuthorForename							X			
ReferenceGrade						X				
ReferenceOrgName1							X			
ReferenceOrgName2								X		
ReferenceOrgName3									X	
ReferenceTitle						X				
ReferenceTitlePart						X				
ReferenceSubtitle							X			
ReferenceTranslation						X				
ReferencePublisher						X				
ReferenceEdition						X				
ReferenceMediumType						X				
ReferencePublicationPages						X				
ReferencePublicationYear						X				
ReferencePublicationMonth						X				
ReferencePresentationDate						X				
ReferenceFullDate						X				
ReferenceCitationDate						X				
ReferenceLocation						X				
ReferenceSerieNumber						X				
ReferenceISBN						X				
ReferenceSerialTitle						X				
ReferenceIssue						X				
ReferenceVolume						X				
ReferenceISSN						X				
ReferenceURL						X				
TableObject						X				
SectionIdentifier	X									

Elements according to type of reference

The reference type elements below are being indicated according to their occurrence, broken down by type of reference (monograph, monograph part, series, etc.) Below the table there is a key to help the reader.

Style	M	Mp	S	Sa	T	Na	P	L	St
ReferenceItem	X	X	X	X	X	X	X	X	X
ReferenceLaw								X	
ReferenceMonograph	X								
ReferenceMonographPart		X							
ReferenceSerial			X						
ReferenceSerialArticle				X		X			
ReferenceStandard									X
ReferenceThese					X				
ReferenceAcademicUnit					X				
ReferenceArticleTitle				X		X			
ReferenceAuthors	X	X		X	X	X	X	X	X
ReferenceAuthorsPart		X							
ReferenceAuthorSurname	X	X		X	X	X		X	
ReferenceAuthorForename	X	X		X	X	X		X	
ReferenceGrade					X				
ReferenceOrgName1	X	X	X	X			X	X	X
ReferenceOrgName2	X	X	X	X			X	X	X
ReferenceOrgName3	X	X	X	X			X	X	X
ReferenceTitle	X	X			X		X	X	X
ReferenceTitlePart		X							
ReferenceSubtitle	X	X		X	X	X	X	X	X
ReferenceTranslation	X	X		X	X	X	X		X
ReferenceMediumType	X	X	X	X	X				X
ReferencePublisher	X	X	X	X		X		X	X
ReferenceEdition	X	X					X		X
ReferencePublicationPages	X	X		X	X	X	X	X	X
ReferencePublicationYear	X	X	X	X	X	X	X	X	X
ReferencePublicationMonth				X					
ReferencePresentationDate					X				
ReferenceFullDate				X	X	X	X	X	
ReferenceCitationDate	X	X	X	X	X				X
ReferenceLocation	X	X	X	X	X	X	X	X	X
ReferenceSerieNumber			X						
ReferenceISBN	X	X							
ReferenceSerialTitle			X	X					
ReferenceIssue				X					
ReferenceVolume				X					
ReferenceISSN			X	X					
ReferenceURL	X	X	X	X	X				X

Key					
M	Monograph	Sa	Journal article	P	events
Mp	Monographic part	T	Thesis	L	Legislation
S	series	Na	Newspaper article	St	standard

Quick reference

Steps for the migration of a Document into the new model

Steps:

1. Create a backup of the document (read only).
2. Delete Title Page and Table of Contents.
3. Delete headers and footers.
4. Attach the template "macros-bvs.dot" (Tools --> Templates... --> Templates).
5. Execute macro "LimpaTextoBVS" (Tools --> Macro --> Macros).
6. Attach the desired template ("bvs-template.dot" or "bvs-template-numbered.dot") [Tools --> Templates... --> Templates) and activate option "Automatically update...".
7. Apply character and paragraph styles.
8. Check for the existence of non-standard styles and do substitutions (Format --> Styles and Formatting --> Show: Formatting in use)
9. Export the content to a new file created with the corresponding template, pasting it soon after the preface.
10. Open the window "Properties" (File --> Properties), select the guide "Summary" and modify the following fields:

Name	Value
Title:	(file name)
Author:	BIREME (or authors names)
Company:	BIREME/PAHO/WHO
11. In the same windows, in the guide "Custom", box "Properties", modify the following fields:

Name	Value
Methodology	(Methodology title)
DocumentTitle	(Document title)
FullCompanyName the document)	Latin American and Caribbean... (in the language of
DocumentVersion	(Document version)
CompanyAddress	Rua Botucatu 862 V Clementino
EditingPlace	Sao Paulo
Country	Brazil
CopyrightYear	(Year)

12. Update fields (Ctrl+A ,F9, Update entire table)
13. Check for the page numbering.
14. Update the Table of Contents, taking into account if the "FakeHeading"s (Acknowledgements and Table of Contents) are appearing. If yes, disable them with (Insert -->Reference -->Index and Tables -->Table of Contents -->Options).
15. Compare the Table of Contents of the current document with the original one and check if the Headings are corresponding.
16. Activate the "Track Changes" (Tools -->Track Changes).
17. Check for the headings and footers of the document.

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Glossary

- **Analytical.** Part of a document, such as the article of a periodical or the chapter of a book.
- **Application.** Program used to execute tasks in connection with an application, such as the creation or edition of texts, drawings, animations, layout, etc. E.g.: text processor, database manager, Internet browser, etc.
- **Backup.** Procedure used to duplicate one or more files and/or directories in another storing device (tape or disc), thus producing a backup copy that may be restored in the event of accidental deletion or physical damage to the original data.
- **Bibliographic Database.** Electronic version of a catalog or bibliographic index.
- **Bibliographic Description.** Description of a bibliographic item by using attributes such as author, title, edition, size, etc.

- **Browser.** Internet page navigator, such as Internet Explorer and Netscape Navigator.
- **Controlled or structured vocabulary.** Collection of related terms, organized according to a methodology, in order to facilitate the access to the information previously indexed with those terms.
- **Database.** Collection of data that are structured to be easily accessed and handled. It is formed by units called records whose attributes are represented by fields. For example, in a file called "customer base", each customer is a record, with several fields such as "NAME", "CUSTOMER CODE", "TELEPHONE" etc.
- **Descriptor.** Embodies a concept accepted in a controlled vocabulary (like a thesaurus.)
- **Electronic Format.** Any form of storage, retrieval or presentation of information that may be transmitted on-line or recorded in magnetic or optical media.
- **Epigraph.** A quotation from a third person at the beginning of a piece of writing and whose meaning is usually related to the piece of writing. *See* quotation.
- **Field.** *See* Database.
- **File.** In computing, a set of data that may be saved into some type of storing device. The data files are created by applications, such as a text processor for example.
- **Glossary.** Vocabulary for specific or controlled use, used in publications to clarify the meaning of technical or restricted terms which are not widely used.

- **Guide.** Defines the processes needed for the production of a source of information or phases of a methodology.
- **Indexing.** Procedure to identify and describe the content of a document with terms that reflect the corresponding subject matters to allow the document to be retrieved later.
- **ISO Format (of files).** Standard established by the ISO to allow the exchange of data between institutions, networks and users.
- **Macro.** Sequence of logical commands in human-readable language to allow the execution of repetitive processes.
- **Manual.** Set of steps and operations, whether automatic or manual, required to provide users with instructions on a certain application, program or methodology.
- **Methodology.** Set of rules and conventions used to standardize a process or the production of a source of information.
- **Monographic Level.** Bibliographic description of a document that is a unit in itself.
- **PDF.** File format developed by Adobe whose objective is to maintain the presentation format of a document designed for printing when this document is stored in digital media.
- **Quotation.** Excerpt originally written by a third person. Quotations appear between inverted commas in a publication, with a mention to the author.
- **SGML.** Metalanguage standard of the ISO (International Organization for Standardization) used for the definition of languages of marking of electronic texts, making possible the interchange and the

distribution of documents in the most varied formats, from one same source of data.

- **Style.** Element which defines the form of a character, a set of characters or a paragraph for viewing or printing purposes. *See* template.
- **Stylesheet.** File which contains the definition of the styles of a publication. *See also* template.
- **TCP/IP Protocol.** Standard that defines the method of communication between digital equipment. It employs a single number of identification.
- **Template.** File which contains the basic definition of the type of document that will be used, with style, predefined text, etc.
- **URL.** Standard defined for the addressing of data contents via the TCP/IP protocol. Internet browsers use the URL to access Web pages.
- **XML.** Language created to allow the arrangement of data in a structured and hierarchical manner, thus facilitating data communication between different systems and platforms.
- **XSL.** Language created to allow the navigation, selection and capture of data of an XML file.

Appendix 1 - Documents update

Product				Responsibility	
BVS-Agenda 1.0				GA/DGI	
Document	Languages			Reviewed by	Date
	P	E	I		
Install readme for Windows	Yes	Yes	No		
Install readme for Linux	Yes	Yes	No		
Administration tutorial	Yes	Yes	Yes		

Product				Responsibility	
Lildbi-Web 1.5a				AFI/FIR	
Document	Languages			Reviewed by	Date
	P	E	I		
Document selection guide	Yes	Yes	Yes		
Procedures manual	Yes	Yes	Yes		
Reference tutorial (appendices)	Yes	Yes	No		
Reference tutorial (database)	Yes	Yes	No		
Common databases updating readme file for Windows	Yes	No	No		
Common databases updating readme file for Linux	Yes	No	No		
Install readme for Linux	Yes	Yes	Yes		
Install readme for Windows	Yes	Yes	Yes		
Installation manual (inside the package)	Yes	Yes	No		

Product				Responsibility	
LeisRef 1.2				AFI/FIR	
Document	Languages			Reviewed by	Date
	P	E	I		
Install readme for Linux	Yes	Yes	Yes		
Install readme for Windows	Yes	Yes	Yes		
Manual de descrição bibliográfica	Yes	Yes	Yes		
Operation manual	Yes	Yes	Yes		

Product				Responsibility	
BVS-DirEve 1.1				SCI	
Document	Languages			Reviewed by	Date
	P	E	I		
Install readme for Linux	Yes	Yes	No		
Install readme for Windows	Yes	Yes	No		
Installation tutorial for Linux	Yes	Yes	No		
Installation tutorial for Windows	Yes	Yes	No		
Usage tutorial	Yes	Yes	No		

Product				Responsibility	
BVS-LIS 2.4a				AFI/FIR	
Document	Languages			Reviewed by	Date
	P	E	I		
Install readme for Linux	Yes	Yes	No		
Install readme for Windows	Yes	Yes	No		
Installation tutorial for Linux	Yes	Yes	No		
Installation tutorial for Windows	Yes	Yes	No		
Methodology / Guide to information sources recording	Yes	Yes	Yes		
Methodology / Guide to implementation and operation	Yes	Yes	Yes		
Methodology / Criteria to select information sources in health sciences available from the internet	Yes	Yes	Yes		

Product				Responsibility	
IAH 2.4a				SCI	
Document	Languages			Reviewed by	Date
	P	E	I		
Install readme for Linux	Yes	Yes	Yes		
Install readme for Windows	No	No	No		
Installation tutorial for Linux	Yes	Yes	Yes		
Installation tutorial for Windows	Yes	Yes	Yes		
Reference tutorial (appendices)	Yes	Yes	Yes		
Reference tutorial (database)	Yes	Yes	Yes		
Installation manual (inside the package)	Yes	Yes	No		

Product				Responsibility	
SciELO 3.x				AFI/PPE	
Document	Languages			Reviewed by	Date
	P	E	I		
Methodology presentation	Yes	Yes	No		
Code manager and title manager	Yes	Yes	No		
Converter module	Yes	Yes	No		
Markup and parser module	Yes	Yes	No		
File preparation	Yes	Yes	No		
Site local	Yes	Yes	No		
Supplemental pages	No	Yes	No		
Cover	No	Yes	No		
PC Programs installation	Yes	Yes	No		
Install readme for Linux	Yes	No	Yes		
Install readme for Windows	Yes	No	No		
SciELO process procedures	Yes	Yes	Yes		
Installation tutorial for Linux	Yes	Yes	No		
Installation tutorial for Windows	Yes	Yes	No		

Product				Responsibility	
BVS-Site 3.1				SCI	
Document	Languages			Reviewed by	Date
	P	E	I		
Administration manual	Yes	Yes	No		
Install readme for Linux	Yes	Yes	No		
Install readme for Windows	Yes	Yes	No		
CSS Mapping	Yes	Yes	No		
VHL Administration tutorial(2.2)	Yes	Yes	Yes		
VHL Graphic desing tutorial (2.2)	Yes	Yes	No		
Installation tutorial for Linux (2.2)	Yes	Yes	No		
Installation tutorial for Windows (2.2)	Yes	Yes	No		

Product				Responsibility	
DeCS Server				AFI/FIR	
Document	Languages			Reviewed by	Date
	P	E	I		
Product not distributed - no documentation found					

Product				Responsibility	
XIIsis 1.4e "beta"				MTI	
Document	Languages			Reviewed by	Date
	P	E	I		
Technical documentation	Yes	Yes	Yes		
Administration manual	No	Yes	No		
XIIsis Presentation	No	Yes	No		
Installation tutorial	No	Yes	No		

Product				Responsibility	
Wxis-Modules 1.0				MTI	
Document	Languages			Reviewed by	Date
	P	E	I		
Install readme for Linux	Yes	No	Yes		
Install readme for Windows	Yes	No	Yes		

Product				Responsibility	
WWWISIS 5.x				MTI	
Document	Languages			Reviewed by	Date
	P	E	I		
Course notes	No	Yes	No		
Reference (online - html)	Yes	Yes	Yes		
Reference (auto-extract html)	Yes	Yes	Yes		
WWWISIS 4 / 5 Guide	No	No	Yes		

Product				Responsibility	
CISIS 4.3				AFI	
Document	Languages			Reviewed by	Date
	P	E	I		
Format language (html)	No	Yes	Yes		
Format language (zip)	No	Yes	Yes		
CISIS version 4.01 new functionalities	No	No	Yes		
CISIS Utilities Manual (html)	No	Yes	No		
CISIS Utilities Manual (zip)	No	Yes	No		

Product				Responsibility	
LILDBI DOS				AFI/FIR	
Document	Languages			Reviewed by	Date
	P	E	I		
Product not distributed - no documentation available					

Product				Responsibility	
EMP 3.3 (DOS)				?	
Document	Languages			Reviewed by	Date
	P	E	I		
Readme	Yes	Yes	No		

Product				Responsibility	
SeCS 2.3 Mono (DOS)				SCI	
Document	Languages			Reviewed by	Date
	P	E	I		
No documentation available					

Product				Responsibility	
WinISIS 1.5 build 3				UNESCO	
Document	Languages			Reviewed by	Date
	P	E	I		
CDS/ISIS for Windows Manual	No	No	Yes		
WinISIS Instructors Manual	No	Yes	No		

Conclusion

Documentation of BVS-DirEve and IAH must be updated as soon as possible to meet the status of the installation and configuration of the programs.

The "readme" files must be reviewed, specially in terms of prerequired software. It must explicitly cite the web servers tested, their versions and PHP version and configuration as well.

SCI/UAT/ACS

18.01.2005

Appendix 2 - File format and presentation format

Product	Responsibility
BVS-Agenda 1.0	GA/DGI
Document	Structure
Administration tutorial	TOOTOMATIC format Key topics: Introduction, Administration, Configuration

Product	Responsibility
Lildbi-Web 1.5a	AFI/FIR
Document	Structure
Document selection guide	MS-Word format Has cover with data Has TOC Tópicos: introdução, conceitos básicos, cobertura da base de dados, critérios de seleção..., anexos
Procedures manual	MS-Word format Has cover with data Has TOC Topics: introduction, characteristics..., operating..., basic functions, profile functions, adapting...
Reference tutorial (appendices)	TOOTOMATIC format Topics: indexing techniques, LILACS fields
Reference tutorial (database)	TOOTOMATIC format Topics: reference to databases owned, database configuration
Manual de instalação	HTML format

Product	Responsibility
Lildbi-Web 1.5a	AFI/FIR
Document	Structure
	Has TOC Topics: sistem description, operation ..., where to install ..., who installs, install package, how to install, changing the database ..., appendices, indexes

Product	Responsibility
LeisRef 1.2	AFI/FIR
Document	Structure
Bibliographical description manual	MS-Word format Has cover with data Has TOC Topics: introduction, how to use the manual, methodology presentation, general help ..., bibliographic description, bibliographical references, annexes
Operation manual	MS-Word format Has cover with data Has TOC Topics: introduction, operating the program

Product	Responsibility
BVS-DirEve 1.1	SCI
Document	Structure
Installation tutorial for Linux	TOOTOMATIC format Topics: About DirEve, installation, configuration, administration, usage
Installation tutorial for Windows	idem
Usage tutorial	TOOTOMATIC format Topics: introduction, characteristics, using DirEve

Product	Responsibility
BVS-LIS 2.4a	AFI/FIR
Document	Structure
Installation tutorial for Linux	Topics: About LIS, installation, configuration, appendices, usage
Installation tutorial for Windows	Idem
Methodology / Guide to information sources recording	MS-Word + PDF format Has cover with data Has copyright Has TOC Topics: introduction, objectives, terms and definitions, essential elements, elementary description, bibliographical references, annexes

Product	Responsibility
BVS-LIS 2.4a	AFI/FIR
Document	Structure
Methodology / Guide to implementation and operation	Formatos MS-Word + PDF Has cover with data Has copyright Has TOC Topics: apresentação, introduction, ações..., fluxo de trabalho (por perfil)
Methodology / Criteria to select information sources in health sciences available from the internet	MS-Word + PDF formats Has cover with data Has copyright Has TOC Topics: introduction, scope, target user, source/responsibility, certification, content, access, bibliographical references

Product	Responsibility
IAH 2.4a	SCI
Document	Structure
Installation tutorial for Linux	TOOTOMATIC format Topics: About the product, installation, configuration, starting the system, references
Installation tutorial for Windows	ditto
Reference tutorial (appendices)	TOOTOMATIC format Topics: indexing techniques, LILACS fields, SECS fields
Reference tutorial (database)	TOOTOMATIC format Topics: references to databases owned, databases configuration
Installation manual	HTML format Has TOC Topics: what is it, where to install, who installs, installation package, how to install, appendices, indexes

Product	Responsibility
SciELO 3.x	AFI/PPE
Document	Structure
Methodology presentation	MS-Powerpoint format
Code manager and title manager	PDF format Has cover with data Has TOC Topics: introduction, where to find..., code manager, title manager
Converter module	PDF format Has cover with data Has TOC Topics: introduction, directory structure, requirements to start the conversion, using the ..., common errors

Product	Responsibility
SciELO 3.x	AFI/PPE
Document	Structure
Markup and parser module	PDF format Has cover with data Has TOC Topics: introduction, markup, program buttons, error messages, parser, annexes (examples and tables - 9 sections in total)
File preparation	PDF format Has cover with data Has TOC Topics: Structure, file conversion to HTML, images, body formatting, final check, annexes
Local site	PDF format Has cover with data Has TOC Topics: introduction, requirements to generate ..., generation of ..., conference of ...
Supplemental pages	PDF format Has cover with data Tabela: conjunto de Documents Has TOC Topics: introduction, collecting of information, information filling, checking of ..., local directory, language of ..., template filling instructions, transferring pages to the server, annexes (templates and tables)
Cover	PDF format Has cover with data Table: document set
PC programs installation	PDF format Has cover with data Tabela: document set Has TOC Topics: introduction, installation of PC programs, annex
SciELO processing procedures	HTML format Has TOC (das seções) Topics: scielo-proc, test.scielo.xx, www.scielo.xx, final considerations
Installation tutorial for Linux	TOOTOMATIC format Topics: About the product, installation, configuration, starting the system, references
Installation tutorial for Windows	ditto

Product	Responsibility
BVS-Site 3.1	SCI
Document	Structure
Administration manual	PDF format Has cover with data Has TOC (old) Topics: introduction, administration area, general administration system, general administration, generating the VHL public site, (new) Topics: introduction, administration area, general administration system, general administration, configuring and administering information sources, configuring and administering topics, annexes
CSS mapping	PDF format Graphic vision of mapping
VHL Administration tutorial (2.2)	MS-Word format Has cover with data Has TOC Ditto PDF version
VHL Graphic desing tutorial (2.2)	MS-Word format
Installation tutorial for Linux (2.2)	TOOTOMATIC format Topics: about the product, installation, configuration, administration, notes, feedback
Installation tutorial for Windows (2.2)	TOOTOMATIC format Topics: about the product, installation, configuration, administration, notes, feedback

Product	Responsibility
DeCS Server	AFI/FIR
Document	Structure
Product not distributed - no documentation available	

Product	Responsibility
XIIs 1.4e "beta"	MTI
Document	Structure
Technical documentation	HTML format Classes and packages hierarchy
Administration manual	PDF format Has cover with data Has TOC Topics: introduction, administration of collections, server administration, export/import
XIIs presentation	Formato PPT
Installation tutorial	TOOTOMATIC format Topics: before installing, installation, comments and suggestions

Product	Responsibility
Wxis-Modules 1.0	MTI
Document	Structure
No documentation available	

Product	Responsibility
WWWISIS 5.x	MTI
Document	Structure
Course notes	MS-Word format Has cover with data No topics separation
Reference (online - html)	HTML format Alphabetic hierarchic
Reference (auto-extract html)	HTML format Alphabetic hierarchic
WWWISIS 4 / 5 Guide	MS-Word format Has cover with data Has TOC Topics: introduction, installation, CGI and environmen variables, executing a search and collection the results, accessing the inverted file, creating and modifying records, IAH interface

Product	Responsibility
CISIS 4.3	AFI
Document	Structure
Format language (html)	HTML format Organized by type, alphabetic by format command
Format language (zip)	Ditto HTML
CISIS version 4.01 new functionalities	HTML format Command summary Command list
CISIS Utilities Manual (html)	HTML format Has cover with data Link based navigation
CISIS Utilities Manual (zip)	MS-Word format Has cover with data Has TOC Topics: presentation, data entry parameters, entry processes parameters, output, startup parameters, general parameters, master file utilities, inverted file utilities, appendices, analytical index

Product	Responsibility
WinISIS 1.5 build 3	UNESCO
Document	Structure
CDS/ISIS for Windows Manual	MS-Word format Has cover with data Has TOC Topics: preface, introduction, overview, installation, creating a database, format language, data entry, search, organizing and printing, import, export and backup, modifying the database, programming with CDS/ISIS, customizing, applications, additional information
WinISIS Instructors Manual	HTML format Page with link to available manuals and guides

Conclusion

Manuals in TOOTOMATIC format must be tested for conversion from HTML to MS-Word.

SciELO documents - already in PDF format - has their original document in PageMaker format. It is suggested to convert them to MS-Word.

It is strongly suggested the rewritten of IAH Manual due to its obsolescence.

SCI/UAT/ACS

17.02.2005

Analytical index

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